Agrigento: 2020 Vision
Implementing a Sustainable Tourism Action Plan

Prepared for:

Fondazione AGireinsieme

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We hope that this report meets the expectations and needs of the Foundation and the wider Agrigento community.

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Agrigento: 2020 Vision

Agrigento today is a tourism destination characterized predominantly by drive-through mass market site-seers who visit (briefly) the spectacular Valley of the Temples. Agrigento, however, has the capacity to become a destination that attracts a discerning, high value tourism market interested in experiencing a range of the destination's attractions and activities. These include culture, cuisine, wineries, historic towns, literary traditions, beaches and parks, museums and churches, together with the Valley of the Temples and other world class archeological sites.

For Agrigento to move from traditional mass market tourism to a more international "new" tourism market requires "2020 Vision." This means having both a *clear view* – perfect vision – of what type of tourism should be developed and *a clear time frame* --- we propose the year 2020 – within which significant changes will be made.

As elaborated below, "high value" tourists are concerned about traveling in ways that do not harm the environmental, are socially and culturally sensitive, and bring tangible economic benefits to the people in the tourism destination. Fundamentally, the goal is to *create a type of tourism industry in Agrigento that benefits local people, protects the environment, and enhances the cultural heritage.* This report discusses the main ingredients of this new type of tourism. Briefly summarized, it is based on:

- **Attracting high value, not high volume, tourism.** This is tourism that caters to an international clientele that is interested in experiential travel – in learning as well as enjoying while on a journey – and is concerned about reducing the environmental, social, and economic impacts of tourism.
- **Using the human, cultural, and natural resources of Agrigento**, rather than seeking major foreign investment and multinational corporations.
- **Expanding the average length of stay from 1.6 to 3 or 4 days**, as well as the average amount spent per day, based on the model of the flagship (the Temples)-hub (*Centro Storico*)-spokes (day tours offering a wide range of excursions and activities for which tourists will stay longer and pay more).
- **Strengthening the hub in th*e Centro Storico* through upgrades including boutique hotels and more B&Bs, restaurants, theatres, art galleries, museums, etc, combined with public investment in electricity, water, WIFI, bike and pedestrian pathways, police, and other services needed by both the local population and tourists.
- **Environmental, social, and economic sustainability** so that Agrigento earns the mantle as a "green city." Sustainability needs to become an integral part of tourism and other development in Agrigento, to be, we argue, "baked into the DNA" of the destination so that all plans, projects, and operations strive to meet well recognized standards and best practices for sustainability.

This 2020 Vision is not so far-fetched. We have seen other destinations transformed in positive ways and within a short time through targeted and largely local initiatives. Take, for example, three cases from Latin America:

- **Costa Rica:** Today Costa Rica is widely recognized as one of the leading ecotourism/sustainable tourism destinations in the world. Ecotourism originally took off

in Costa Rica in 1987 just after President Oscar Arias won the Nobel Peace Prize for negotiating an end to the wars in Central America. Before then, the number of tourist arrivals had been declining. But with peace, small-scale nature-based tourism centered around national parks began expanding very quickly, using mainly local investment and entrepreneurship. *Within just six year* – by 1993 – Costa Rica was hailed as the #1 ecotourism destination in the world and tourism had become the country's leading industry. Ecotourism has continued to grow, with active government and private sector involvement, a successful brand -- "No Artificial Ingredients" -- and a sustainable tourism certification program that awards companies that meet a rigorous set of criteria.

Lessons for Agrigento: 1) political stability is necessary for tourism to grow; 2) local entrepreneurship and creativity are more important than foreign investment; 3) a clear vision that ecotourism can bring tangible benefits to local people and the environment is coupled with effective partnership between the public and private sectors; 4) impacts of tourism are measured through certification programs and eco-labels awarded to companies (hotels, tour operators, rental cars, airlines, as well as beaches) that meet the criteria.

- **Mexico City:** The Centro Historico – the concentrated historical center of Mexico City – has in recent years undergone major renovations of important public buildings, the Aztec ruins of the Great Temple, and numerous museums, plus a beautification program for the *zócalo* (the main city square) and refurbishing of more than 80 18th- and 19th-century buildings. These public improvements have spurred development of new hotels, restaurants, bars and clubs, some located in historic buildings. Much of this facelift has been financed with $300-million in grants from Mexican telecommunications magnate and philanthropist Carlos Slim, who is reputed to be the richest person in the world.

  Lessons for Agrigento: Targeted investment by a philanthropic business leader can kick start substantial renovations that preserve historic landmarks and improve the quality of the city for both tourists and local residents.

- **Bogotá, Columbia:** During his 3 year term as Mayor of Bogotá in the late 1990s, Enrique Peñalosa transformed the Colombian capital from a dysfunctional city crippled with narco-violence into a globally recognized model as a green and livable city. The numerous radical improvements included giving priority to children and public spaces and restricting private car use. During Peñalosa's term the city built hundreds of kilometers of sidewalks, bicycle paths, pedestrian streets, greenways and parks, and planted more than 100,000 trees. Peñalosa created a new, highly successful bus-based transit system and turned a deteriorated downtown avenue into a dynamic pedestrian public space. As Mayor, he also helped to transform the attitude of Bogotá residents from one of negative hopelessness to one of pride and hope, developing a model for

urban improved based on equal rights for all people to transportation, education, and public spaces.

Lessons for Agrigento: 1) Peñalosa says success came not through outside investment, but through political will backed by citizens' rights and empowerment; 2) a clear vision, strategic targets, and dynamic leadership brought about the city's transformation in just three years.

As these examples illustrate, change is possible and, with careful planning and targeted investment, it can happen rapidly. Agrigento's transition has, in fact, already begun. Over the last decade, excellent planning has been done through a series of tourism strategic development frameworks. Our interviews demonstrated that tourism experts, academics, and public officials in Agrigento have a good understanding of the weakness of the current model and the type of tourism they should strive to build. The dynamic growth of B&Bs and of tour guides offering a range of high quality cultural and nature tours demonstrates a strong local entrepreneurial spirit. And, we were told, the number of independent travelers (FITs) as well as the number of international visitors has been growing in recent years. Finally, the creation by the city's leading industrialist, Salvatore Moncada, of the Fondazione AGireinsieme can be the catalyst needed to propel forward the transition to a robust and sustainable tourism industry. We applaud the Foundation's commitment to using tourism as an engine for sustainable growth, poverty reduction, and rediscovery of memory, particularly among young people.

On the other side, of course, Agrigento faces numerous challenges. This report seeks to examine where Agrigento's tourism sector is today, how it stakes up against other international destinations, what are the current consumer and industry trends that are relevant to Agrigento, and what are the most important steps – the Action Plan – for accelerating Agrigento's transition to a 21st century tourism model.

Tourism Today in Agrigento, the 'Destination'

Introduction

The following section presents our assessment of the main issues and challenges currently facing the Agrigento's tourism resource base.[1] Our analysis is based on the following:

o   Field observations and the *in situ* rapid assessment we made during our January 14 – 19, 2012 visit to Agrigento;

o   Our interviews and meetings with the President, Board of Directors and technical team of the Foundation (Fondazione AGireinsieme) and with a variety of both public and private sector stakeholders. In all, we interviewed some 45 key stakeholders (see Annex 1 for list);

o   Juan Luna's *in situ* study tour of other cities (Catania, Taormina, Siracusa, Noto, Modica, Ragusa, Piazza Armerina and Caltagirone) in Sicily (January 19-24, 2012);

o   A *Destination Review* based on a range of sources (academic studies, tourism reports, websites, etc.), which we conducted both prior to and after visiting Agrigento (see Annex 2); and

o   An analysis of four overlapping strategic plans developed over the last decade (2002 – 2012) to facilitate tourism decision-making by the public and private sectors. These detailed and well constructed strategic plans are:

-   **Integrated Regional Program Valley of the Temples (PIT 34):** A strategic plan that established the foundation to enhance cultural tourism through a series of public projects across an area from the Valley of the Temples to the historic center (*Centro Storico*) of Agrigento city. The plan, supported by the Sicilian Regional Government, completed some 14 public projects during the years 2002 –2006. Enzo Camilleri, who was appointed by the Mayor of Agrigento, directed it.

-   **Strategic Plan of Agrigento:** focused only on the municipality, it covers a ten-year period from 2006 – 2016. Twelve working groups were established comprised of public authorities, professional associations, and the private sector that developed three different "visions" or brands for Agrigento -- as a 'Land of Art, History and Nature', a 'City of Europe', and 'The Bridge to the Mediterranean'. Several of the plan's projects are at different levels of development and funding. The mayor of Agrigento also appointed Vicenzo Camilleri to coordinate this plan.

-   **Integrated Urban Development Plan and Integrated Territorial Development Plan (PISU-PIST):** funded by the Sicilian Regional Government for the period from 2007 – 2013, it is a logical extension and sequence to the PIT 34. It includes other municipalities in proximity to Agrigento. Most of its 19 proposed projects have not yet received funding. Vicenzo Camilleri and Giacomo Sorce coordinate it.

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[1] The tourism resource base is comprised of all the tourism resources and features in a destination that create its appeal or image and serve to draw people to the destination. Together, they form the core of visitor attractions supported by services and facilities that accommodate and entertain tourists while visiting the destination area. Tourism resources represent the supply-side of the basic supply-and-demand equation and they are, in essence, the pulling power to attract specific groups [market segments] of tourists. Kerry Godfrey, K, and Clarke, J, "The Tourism Development Handbook*"*, Thomson Learning, London, 2001 p. 65

- **Triennial Tourism Development Plan for the Valley of the Temples Tourism District**: a regional plan that includes the original municipalities of the PISU-PIST plans and additional municipalities from the Province of Caltanissetta. The program covers the period from 2007 through 2013. Resources for this plan are only now being considered. The Tourism District has designated Gaetano Pendolino, who is President of the Valley of the Temples Tourism Consortium.

In addition, we bring our professional expertise gained over many years and in dozens of destinations. Our skills and knowledge most relevant for Agrigento are, we believe, in the fields of sustainable tourism, consumer and industry trends, different models of tourism, and tourism destination development to benefit local communities, enhance culture, and protect the environment.

In trying to develop a report that meets our assignment of *providing an action plan for Agrigento*, we have had to make judgment calls about what to include and what to omit. It would have taken several studies to present an in-depth analysis of the numerous influences and pressures, both global and local that are affecting tourism in Agrigento. We have, however, captured a number of these in our SWOT analysis (Annex 5).

Similarly, it would have taken several reports to review and evaluate the wide range of reforms suggested by those we interviewed and put forth in the strategic plans and other documents. We have focused only on those issues and ideas that, in our analysis and that of those we interviewed, are most central to achieving the vision for building the new type of tourism as laid out in the preceding chapter. Put succinctly, our vision for Agrigento is *to create diverse, sustainable, and high value tourism geared to the international market and grounded in the local human, cultural, historic, and natural assets.*

Agrigento as a Tourism Destination

We are defining the geographical area of study as the area that includes: (i) the well-known World Heritage Cultural Site of the Valley of the Temples; (ii) the urban area and historical center of the city of Agrigento (*Centro Storico*); (iii) the coastal area of San Leandro; (iv) Port Empodocle; and (v) other tourism attractions and sites that can be visited within a day and returning to Agrigento's historic center, such as Realmonte, Sant'Angelo Muxàro, Favara, Torre Salsa, etc.

Taken together these different locations can be considered an integral part of the overall tourism resource base, which we generically refer to as the 'tourism destination.' According to Ritchie and Crouch, a tourism destination is a geographical area or region within which the visitor enjoys various types of experiences. It is the spatial area whereby the combination of

multiple elements and the interconnecting operations of the tourism value chain make up the whole consumer experience.[2]

Our overall assessment is that Agrigento is a *mature destination* with adequate physical access (despite the fact of not having an airport), favorable climatic conditions due to its southern Mediterranean location, visitor-friendly hospitality, a vital cultural heritage, significant and varied tourism, and functioning general infrastructure and tourism superstructure[3] to support the needs and interests of tourists visiting the destination.

A critical feature is that the destination is heavily dependent on the natural and cultural resources of the Valley of the Temples,[4] which constitutes the *flagship tourism attraction* for Agrigento. The strong market appeal of the Valley of the Temples will undeniably continue to influence travel decisions to visit this area.

However, as the four tourism strategic development plans correctly recognize, overdependence on a single attraction – the Valley of the Temples -- can be both an opportunity and a risk. On the one hand, this prestigious World Heritage Site draws large numbers of visitors – between 600,000 and 700,000 a year.[5] Based on this important attraction, the strategic plans set forth projects to: (i) expand and enhance other visitation areas in the archaeological park, including the Kolymbetra Garden; (ii) regenerate and revitalize the historic center of the city of Agrigento; and (iii) implement an integrated transportation system, known as Sistema Omega, that will facilitate the flow of tourists between the Valley of the Temples and the historical district and further integrate the geographical territorial functionality of the destination with critical infrastructure investments.

On the other hand, the Valley of the Temples is built largely on 'mass' market tourism. Some 60% of visitors arrive on chartered coach buses from Palermo, Trapani, and Catania during the months of March through June and September through November when the weather is most pleasant. These travelers typically come on pre-paid packages that have been arranged, sold and distributed through outside travel wholesalers and retailers. Most prominent is Aeroviaggi, the largest tour operator for Sicily, which has its own buses, guides and hotels. It caters to Italian pensioners and specializes in fast paced 7-day tours, with 14 different stops. They stay at the Valley of the Temples for only two hours, see only the main esplanade of the Temples, spend

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[2] Ritchie, J. R. Brent and Crouch, Geoffrey I., *The Competitive Destination: A Sustainable Tourism Perspective,* CAB International, Wallingford, UK, 2003.

[3] General infrastructure includes the facilities, systems and services that range from transportation, energy generation, transmission and distribution, telecommunication, water, sanitation and drainage systems to medical, financial, educational systems, facilities, and services. Tourism superstructure consists of the accommodation facilities, food services, and transportation facilities designed for visitors.

[4] The official Valley of the Temples archaeological park web site, http://www.parcodeitempli.net, provides an excellent overview of the area's natural and cultural resources.

[5] For the year 2011, the total number of tickets issued, including those given away for free, was 605,291. *Riepilogo dei Visitatori Valle Templi Anno 2011*. Statistical information provided by the Administration of the *Parco Archeologico e Paesaggistico della Valle dei Templi di Agrigento*.

insignificant amounts of money, and do not visit the other archaeological attractions and areas. For example, only 6% of Temple tourists visit the neighboring Kolymbetra Garden and few purchase discounted tickets to visit both the Temples and the archeological museum.[6] In addition, in 2011, 44% of the total number of visitors that visited the park, entered free of charge.[7] A direct consequence is that virtually none of the 100-odd licensed tour guides can make a living from guiding; all must seek other types of employment.[8]

Seasonality is an important factor. As noted, the 'mass' tourism segment visits the Valley of the Temples between March and June and September and November. Overall visitation, however, reaches a peak in the summer months of July and August, when school holidays and European and Italian paid annual leave is in full force, leaving the remaining shoulder months with low numbers of tourists. It is estimated that, out of the 600,000 visitors who visited the Valley of the Temples, in 2009, approximately 30% to 50% visitors spent 1.6 nights in the Agrigento municipality hotels. In contrast, the average length of stay for the Province of Agrigento was 3.3 nights, or double for 2009.[9]

This leads to the following negative consequences: (i) tremendous fluctuations in hotel occupancy rates which also impacts the supply chain (food and beverage suppliers, restaurants, laundry services, taxis, some retail stores, etc.); (ii) work force layoffs during the low season which exacerbates the already high unemployment rate; (iii) under-utilization of the general tourism infrastructure in off-peak periods; and (iv) strains on resources during the peak periods. This in turn, leads to dissatisfaction among both the tourists and local residents who face, in peak seasons, higher prices, traffic congestions, overcrowding, and low service performance.

Based on the above, it is evident that this model, which is heavily dependent on a mass tourism market drawn to a single attraction --the Valley of Temples --, has not generated the desired economic multiplier effect in the municipality of Agrigento. The civic, professional, and business leaders we met with recognize this reality, and it is the basis for the four strategic tourism plans that have been formulated thus far. They all address the deficiencies in Agrigento's current tourism model by articulating the need to develop a competitive destination based around more diverse tourism offerings and attracting different type of clientele.

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[6] Interviews with Giuseppe Parello, Director of the Archeaological Park of the Valley of the Temples and Giuseppe Lo Pilato, Director of the Kolymbetra Garden. Mr. Lo Pilato indicated that the goal is to reach 50,000 visitors annually so that the Garden can become self-sustaining.

[7] For the year 2011, the total number of tickets given away for free was 267,017. *Riepilogo dei Visitatori Valle Templi Anno 2011*. Statistical information provided by the Administration of the *Parco Archeologico e Paesaggistico della Valle dei Templi di Agrigento*.

[8] Confirmed by Enzo Cacciatore, licensed guide for the Valley of the Temples, and other guides we interviewed.

[9] Statistic retrieved from the Fondazione AGireinsieme power point presentation (slide #13) on occasion of the stakeholder meeting held in December 2011.

The evolutionary planning process that has taken place over the last decade in compiling these various strategic plans is testimony to the immense amount of time, creative effort, and financial resources spent in identifying and analyzing key strengths and weaknesses for Agrigento's entire tourism system. Further, they identify concrete actions and interventions for improving the destination's overall tourism potential and appeal. In our view, they constitute a sound strategic planning framework for guiding future tourism-related development activity. They define a vision with clear goals and specific objectives, as well as an outline of planned actions. Some of these actions already implemented, others are awaiting financial approval, and still others require further feasibility studies.

Key Gaps and Omissions

Rather than reviewing the details of these important strategic plans, we believe it is more useful for us to focus on what, in our view, are their gaps and omissions, and to propose how these should be incorporated as part of a holistic destination strategy. We have identified a set of fundamental issues that need to be addressed to ensure that the strategy and planned interventions contained in these strategic plans can come to fruition in the short to medium-term. We have divided these into six key areas:
1. Defining the Geographic Boundaries
2. Creating an Effective DMO
3. Moving to a Flagship-Hub-Spokes Model
4. Work Force Development
5. Website Development
6. Ensuring and Enhancing Sustainability

We discuss these in the remainder of this chapter, in the following chapter, and in our SWOT analysis.

1. Defining the Geographical Boundaries of the Agrigento Destination

Currently, the PISU-PIST strategic framework focuses on a geographical area that includes the municipalities of *Agrigento, Favara, Aragona, Porto Empedocle, Comitini, Raffadali, St. Elisabetta, Realmonte*, and *Joppolo Giancaxio*, all within the Province of Agrigento. The recent establishment of the Valley of the Temples Tourism District enlarges the area into a very much greater territory that includes the ten above plus nine more municipalities within the Province of Caltanissetta, and there is the possibility to add more.

In our opinion, this new larger tourism territory raises significant issues related to tourism policy formulation and coordination, as well as destination planning, management, and marketing. These are some of the concerns raised in an important case study of the South-East Cultural District in Sicily, which links together baroque towns (initially 8, now 16) that have been placed on UNESCO's World Heritage List.[10] One of the main issues identified in the case study that is particularly relevant to the current effort of establishing the Valley of the Temples Tourism District is related to putting in place an additional territorial management structure and system. From a political and administrative perspective, it has complicated the already difficult political

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[10] Le Blanc, Antoine, "Cultural Districts, A New Strategy for Regional Development? The South-East Cultural District in Sicily." *Regional Studies Association*, Vol. 44:7, 2010, pp. 905-917.

and administrative system of the provinces and municipalities involved. For instance, decision-making is cumbersome because three *Soprintendenze* -- the tourism district, the region, and the state – must agree on projects within the original eight district cities.[11] To be successful, there needs to be an organization capable for articulating and managing the district's tourism resources.[12]

From our perspective, the new Tourism District for Agrigento and Caltanissetta provinces may well be too large, especially for tourism initiatives supported by the Foundation. Our recommendation, elaborated below, is that the Foundation should support and concentrate its efforts on a smaller geographical area, with the historic city center as the most important starting point for major reforms. In our view, the priority should be on building first a robust tourism destination focused on the Valley of the Temples (the flagship attraction), the city's historic district (the hub), and a range of natural, cultural, historic, culinary, craft, and adventure attractions and tours (the spokes), within the proximity of the historic center. We recognize that the geographical area of the PISU-PIST contemplates this strategic approach. However, it excludes other municipalities and communities that are just as important in terms of their natural and cultural resources and that are adjacent to the municipality of Agrigento. We believe that from a supply-side point of view, a more concentrated geographical area provides less complexity in terms of governance, financing, marketing, and fiscal accountability. The broader Tourism District, encompassing two provinces, *may* make sense once the flagship-hub-spokes model is successfully and sustainably established.

2.   Creating an Effective Destination Management Organization (DMO)

International best practices and experience have demonstrated that for destinations to compete globally, an effective Destination Management Organization (DMO) is required. DMOs may be a public sector agency, a mixed public-private sector entity or a private sector driven organization. A DMO's organization is ultimately decided by the stakeholders at the destination in terms of what they believe will be the best organization to advance their overall interests and those related to the management and coordination of tourism policy, planning, and marketing for the destination.[13] For DMOs to be effective they must have the technical capabilities and the tools necessary to work closely with the various public sector agencies and private tourism businesses and organizations that have a stake in enhancing the destination's competitiveness and sustainability. As illustrated in Figure 1 below, the role of a DMO is key in providing the necessary leadership and coordination a destination needs to enhance its competitiveness.

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[11] The Sicilian Region has a special constitutional stature regarding the authority on the conservation and use of cultural goods. At the core of the conflict is the distinction between conservation *('tutela')* and promotion *('valorizazione')*, two sets of processes, which now depend on distinct decision-makers. The Italian state can still control regional decisions, especially due to a technical agency, the *Istituto Centrale del Restauro* (Central Institute for Restoration) in Rome. In recent years, the situation has changed, since a series of laws has enabled the possibility for private investors to manage heritage sites. This was made possible when the central government passed a constitutional reform separating heritage protection from site management. In Sicily, the key power is still controlled by local government offices. No intervention on cultural heritage can take place without the consent of the *Soprintendenza* (Le Blanc, A. (2010). Regional Studies Association. Vol. 44.7, pp. 905-917.

[12] Le Blanc, "Cultural Districts."

[13] Ritchie and Crouch (2003).

Figure 1: Role of a DMO[14]
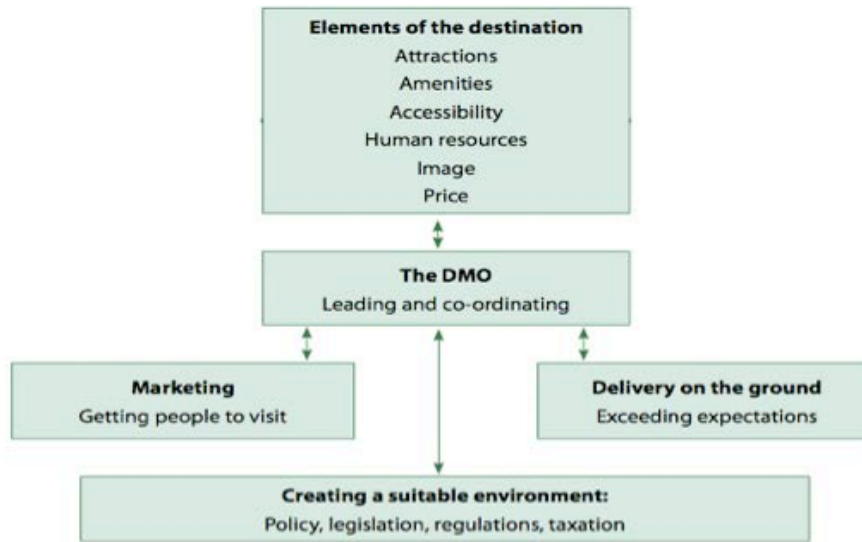
Ideally, DMOs should have sufficient autonomy, flexibility, and funding to manage the destination's tourism development process. This will enable it to react to the ever-changing market and environmental conditions.

Based on our analysis to date, it is not clear if any of the committees responsible for directing the many components of the PISU-PIST and the Valley of the Temples Tourism District strategic tourism plans are capable of fulfilling the role of a DMO. This is further complicated by the fact that there is a *Consorzio Turistico Valle dei Templi[15]* and a recently established *Comitato Directivo* for the Valley of the Temples Tourism District.

This is an issue that, in our opinion, should be addressed and clarified in the very short term to ensure that the strategic tourism development framework that is in place can be implemented by a responsible body with a clear mandate to lead the overall nature and direction of tourism policy, planning, marketing and development for the destination. This situation is, unfortunately, not unusual in Italy. An OECD study of tourism in Italy states that the '*lack of integration of tourism policy into an overall development strategy remains problematic…and the multiplicity of stakeholders active in tourism development and promotion represent a significant challenge in terms of organization and governance, and for the implementation of a coherent and efficient national tourism strategy.*'[16] Experts we interviewed say that there is currently a lack of government leadership on tourism policies. They pointed out that this leadership vacuum

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[14] UNWTO, *A Practical Guide to Tourism Destination Management* (2007).

[15] Established in 2005, the non-profit organization *Consorzio Turistico Valle dei Templi*, brings together 50 members of the tourism supply-chain in the area of study that includes hotels, agro-tourism establishments, working farms, tour guides, cultural organizations and cooperatives, tour operators and travel agencies, communication, transportation and business services. The purpose of the consortium is to coordinate the promotion of the Valley of the Temples and the nearest cultural and natural attractions as a destination, and marketing its members' services.

[16] *OECD Studies on Tourism: Italy: Review of Issues and Policies*, OECD Publishing, 2011, p. 63, http://dx.doi.org/10.1787/9789264114258-en. .

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prevents a number of critical issues from being addressed.

For instance, the owners of B&Bs in the *Centro Storico* are being affected by the inaction of public authorities in approving investments related to the strengthening of key services (e.g., water supply, sanitation, energy), telecommunications infrastructure (free Wi-Fi), and improved visitor access (traffic control, enhanced pedestrian mobility, shuttle buses, parking and 'green' areas). In addition, there is no policy in place to regulate the B&Bs sub-sector. B&Bs have a different classification (*extra alberghieri*) under which they pay a flat fee, making their taxation rate much lower than for hotels. Those interviewed said that improved regulation would enable fairer competition between these two types of accommodations. Another issue is the complexity and rigidity of the cultural heritage management laws, which directly affect the revitalization efforts of the historical buildings in the *Centro Storico*. According to our interviews, the *Soprintendenza* must approve all proposed changes in the *Centro Storico* and other areas considered cultural heritage assets. This is complicated by other competing institutions that are subject to different levels of authority, such as the Sicilian Provincial Government.

Given this situation, those interviewed recognized that the establishment of an independent DMO would indeed contribute towards developing a more effective working partnership between government and the tourism industry, which is required to move forward with the planned interventions of the strategic tourism development framework. In our opinion, the Foundation could play a key-convening role by bringing together the public sector and local tourism industry decision-makers to address this vital issue, which is fundamental.

3. Moving to a Flagship-Hub-and-Spokes Model

The Flagship-Hub-and-Spokes tourism product development model consists of utilizing a main (flagship) attraction as the key tourism resource to differentiate the destination from other destinations. It is an attraction characterized by its strong market appeal. The hub is the location where visitors stay-over to visit the flagship attraction and also to use as a 'headquarters' base to explore and visit other attractions (spokes) that are within a relative short proximity.

This model is based on using the appeal, image and World Heritage Site status of the Valley of the Temples as the flagship attraction. Its 'pulling effect' is the central component for enhancing not only the Temples site but also for revitalizing the *Centro Storico* as the 'hub' from which visitors can travel to the natural and cultural attractions (spokes) that can be visited in a day. In our evaluation, there are several main issues, however, that need to be highlighted and addressed in the short term in order to make this flagship-hub-spokes model effective. We highlight them here and in our SWOT analysis we provide more detail.

• The Flagship: Valley of the Temples

Based on our interviews with Giuseppe Parello, Director of the Archaeological Park, and his staff, the overall management of the World Heritage Site is being managed relatively in a positive and constructive way. They recognize that there are always ample opportunities for improvement, especially in the areas related to visitation management and marketing, as well as encouraging further research based on existing and new areas within the Park.

Regarding the subject of visitation, we commend the ongoing efforts of organizing more events during the low and shoulder seasons, extending the hours of visitation, encouraging night visitation during the hot summer months of July and August, promoting exclusive private tours and the study of new itineraries to visit other areas within the park. In addition, we praise the recent endeavor of conducting a visitor satisfaction survey for the first time, in 2011, but as of late January 2012, the results had not yet been tabulated.[17] Conducting visitor satisfactory surveys are important and should be conducted on a regular basis.

We also believe that it is critical to conduct interviews with individual visitors and hold focus groups with guides and tour operators to better understand the differences between the mass market and the Free Independent Traveler (FIT) markets. The FIT market, made up of those not traveling on pre-packaged tours, has distinct characteristics (discussed below) and offers the best prospect for expanding Agrigento's tourism sector in a competitive and sustainable manner. Surveys of FIT visitors is important to further understand their key motivations for visiting the Valley of the Temples, as well as their other travel interests and preferences. The knowledge to be attained can then be used for specifically targeting these groups and for further enhancing the marketing of the image of the World Heritage Site and linking it to other attractions in the Agrigento destination.

In terms of existing significant archaeological and natural areas that receive low number of visitors, such as L'Agora, the Gymnasium, the Hellenistic-Roman and Roman-Punic quarters' ruins and the Kolymbetra Garden, we learned that this aspect needs further attention. In our view, the Park's administration with the support and collaboration of the licensed guides and the Kolymbetra Garden administration needs to promote and better "package" the visitation experience of the entire archaeological zone, including the Regional Archeological Museum and the Almond Museum. This particular recommendation of promoting and improving the visitation to all the assets within the Park, can contribute significantly to lengthening the stay of the visitors in the area of study.

It was acknowledged that opening new areas for visitation is an issue that needs further study, which we agree with. In our view, this action is an opportunity to encourage scientific research, provide employment for the local students who are studying and graduating in the cultural heritage field and the opportunity to further expand the international academic and scientific exchange programs currently in place.

Regarding the issue concerning the necessity to involve Agrigento's youth more assertively in activities that are conducive to fully appreciate their Valley of the Temples cultural heritage, we recommend the institutionalization of the UNESCO's World Heritage Volunteer Program. This program has been designed to raise awareness among young people of the importance of World Heritage Sites. It gives young volunteers, both local and international, the knowledge and skills

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[17] Tabulation of the data was still being processed and analyzed during our visit.

to become involved in the conservation of World Heritage. The UNESCO World Heritage Centre in close collaboration with Coordinating Committee for International Voluntary Service (CCIVS) administers it.[18] From 2008 and 2010, 50 World Heritage Volunteers projects were carried out by youth organizations in 18 countries. In 2011, 28 projects in 17 countries were undertaken. This is an excellent opportunity to involve the local youth of Agrigento and also to invite young volunteers from Italy and other nations to participate and collaborate.

- **Revitalizing the Hub: The Historic Center**

Transforming the historic center of Agrigento into a safe, healthy, hospitable and attractive 'hub' for stay-over tourism is critical. This vision is fully encapsulated in all of the strategic plans that we reviewed.

In our analysis, Agrigento's historic center possesses significant cultural heritage assets and scenic views that can be transformed into valuable products to be consumed by the Free Independent Traveler (FIT). Catering to this market will increase the average length of stay and, often, the average daily spending per visitor. For instance, just by focusing on the further enhancement of *Via Atenea* and the *Piazza Municipio*[19] with the establishment of a few high-quality boutique hotels, restaurants, art galleries, retail food shops and wine bars in renovated historic buildings along the *Via* and within the *Piazza*, combined with the staging of year-round international cultural events at the Pirandello Theatre, dynamic visitation and spending will be generated. We commend the current efforts that are being taken in this direction, but more action is required.

There are two benchmarks in Sicily that we would like to highlight: (i) the Corso Umberto in Taormina with its elegant clothing, wine and food retail shops, high-quality restaurants, Five and Four-Star boutique hotels and B&Bs, art galleries, ceramic workshops, etc., that have been established in the renovated historical buildings along this main street; and (ii) the historic center of Ortigia, whereby religious and historical buildings and residences have been fully renovated with the incorporation of high-quality retail businesses that are necessary to attract visitors. In addition, free shuttle buses combined with a bicycle mobility system are two key features that facilitate visitation throughout the peninsula's historic center.

These kinds of enhanced attractions are what draw the FIT market, characterized by individuals who are typically over 35 (though not always), with above average income and education, who prefer to travel in small groups or as couples. They tend to be environmentally aware, enjoy experiencing new ways of life and are enthusiastic, off the beaten track explorers. They appreciate good food, architecture, and the heritage of local cultures and like to avoid mass tourism. They reject the traditional pre-package holidays in favor of a more individualistic and fluid approach to travel. The driving principles behind independent travel are autonomy and

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[18] http://whc.unesco.org/en/activities/654

[19] This is where the *Palazzo Municipal* is located which houses the Mayor's Office Building and the Pirandello Theatre, and also where the Civic Museum, the Basilica of *San Domenico* (17th Century) and the *Collegio del Fillipiini* are also located.

freedom.[20]

Furthermore, FIT travelers rely heavily on web sites and mobile devices. For instance, for our trip to Sicily, we downloaded the Guide section from the Think Sicily web site, which was particularly helpful before our arrival and while *en route* to Sicily. It provided valuable information about Agrigento and for planning the trip to the other destinations (Catania, Taormina, Siracusa, Noto, Modica, Ragusa, Piazza Armerina and Caltagirone). In addition, it was a useful tool for learning about the tangible and intangible resources these destinations offer such as, the 17th century Baroque architecture style, and their religious, food and wine festivals.[21] The application is an example of the new consumer technology trend whereby providers of tourism products and services are adding more online content and context to mobile devices to enable the consumer to have improved individualized information for travel planning and consumption.

Another attraction that could lure the FIT market into the 'hub' of the historic center, either before or after visiting the Valley, would be the transformation of Agrigento's mediaeval abbey *Monastero di Santo Spirito.* Currently Fodor's "Travel Intelligence" website has an unenticing description: "There are a few other things to do and see in the area."[22] The Abbey can be transformed into a key visitor attraction by restoring the property and its gardens and rescuing its history with enhanced visitor information and interpretation. In addition, marketing the consumption of the jealously guarded and centuries-old secret dessert recipes of the almond cakes or sweet couscous with pistachios and cocoa, prepared by the nuns who still live in the abbey, would immeasurably contribute to rescuing and promoting the cultural values of this historic and cultural asset.

We present the following case study of the historic Archabbey monastery in Hungary, to illustrate how a monastery, which has been functioning for more than a thousand years, has been able to become a central attraction for the town of Pannonhalma. Today, its 'area of influence' includes a variety of facilities and attractions (e.g. visitor center, accommodation, conference center, winery and souvenir shops) that attract sizeable numbers of visitors and provide economic activity and benefits for the town's population.

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[20] http://www.accommodationdirect.net/independent-travel.php.
[21] http://www.thinksicily.com/guide-to-sicily.aspx. This web site caters to the high-end consumer market by offering throughout Sicily, attractive villa rental properties and associated customized services.
[22] "Monastero di Santo Spirito Review," Fodor's Intelligence Review, http://www.fodors.com/world/europe/italy/sicily/review-202669.html

Case Study 1: Archabbey of Pannonhalma – Hungary

Credit: www.fatosz.eu

Pannonhalma is 20 km from the city of *Győr* in northwestern Hungary and 120 km from Budapest. The Benedictine *Pannonhalma* Archabbey and Secondary School, located above on *Szent Marton* Hill, dominate the town, with 4,000 inhabitants. In 1996, parts of the town were included in UNESCO's designation of the Abbey as a World Heritage Site. In 2000, the village of *Pannonhalma* was granted town status. *Pannonhalma* Archabbey, founded as the first Hungarian Benedictine Monastery in 996, is one of the oldest historical monuments in Hungary. The monastery became an archabbey in 1541 and was later fortified. The properties of the Order were confiscated by the communist state from 1950 until the end of communism in Hungary in 1989. In 1995 the complex was reconstructed and renovated. There are currently around 50 monks resident in the monastery. A four-stage development plan was commenced in 2001.

The Archabbey now offers a visitor centre, accommodation, conference facilities, winery, and gift shop selling local products (including chocolates, herbs, herbal teas, lavender products and Benedictine liqueur). The gift shop enables local linkages to be created, thus spreading the local economic benefits of tourism. In 2009 the Archabbot of *Pannonhalma* announced the commencement of a Ft$1.57 billion (US$7.2 million) development project, which is 80%, funded by the government's New Hungary Development Plan 2007–2013. The development includes a new visitor centre, with a restaurant, an underground garage and rooftop cafe terrace with panoramic views. The aim is to increase the number of visitors from 100,000 to 120,000 annually. The Archabbey received a total of around Ft$2 billion (US$9 million) from eight different European Union tenders between 2004 and 2009. The Archabbey of Pannonhalma is a good example of a flagship product that was created around a renowned historic site and using this cultural heritage into brand name, thereby bringing wider benefit to the surrounding region.

Source: Based on following website: www.bences.hu/en.

Another case study that is extremely relevant with regard to the regeneration and revitalization of the historical center of Agrigento (*Centro Storico*) is the Guggenheim Museum of Bilbao, Spain. It is an excellent benchmark of a major attraction created from scratch as the centerpiece of a much larger scheme: the urban revitalization of Bilbao.

Case Study 2: Guggenheim Museum, Bilbao, Spain

The Guggenheim Museum Bilbao is a museum of modern and contemporary art located in Bilbao, Spain. The museum is part of the Guggenheim network of museums and features presentations from the Permanent Collection and temporary exhibitions. The groundbreaking building was designed by the architect Frank Gehry and built by Ferrovial and Balzola. The Computer Aided Three Dimensional Interactive Application (CATIA) aided the spectacular design and construction of the building, resembling a ship with a skin designed from seemingly random curved titanium panels representing the scales of a fish. The city of Bilbao in the Basque country of Spain was in need of revitalization in the 1990s with industrial decline resulting in high unemployment. Construction of the museum was part of an overall strategy – the Bilbao Metropolitan Revitalization Plan – to redevelop the city and diversify the local economy. The concept of locating a Guggenheim Museum in Bilbao was first originated in 1991, with construction beginning in 1994.

The Guggenheim Museum Bilbao was constructed on a former industrial area and, when it opened in 1997, was located in a post-industrial area of warehouses and rusting cranes. Since the launch of the museum the effect on the city has been dramatic. Parks, cycle lanes and riverside cafes have replaced the post-industrial environment. In the first year the museum was attracting over 100,000 visitors a month, this leveled off to around one million visitors a year, the majority from outside the Basque region; well over half from other countries. The building was constructed on time and on budget, rare for this type of architecture. The construction cost, around US$100 million, was shared equally by the Basque Government and the Provincial Council of Biscay, and was recouped within three years. The ongoing operating costs of the museum are 70% funded by the museum and 30% by the public authorities. In 2009 direct expenditure generated by the museum's activity in the Basque Country amounted to €204 million; of this €28 million related to expenditure within the museum premises and the remainder directed to the catering, shopping, lodging, transport and leisure sectors. During 2009 the museum activities contributed to the maintenance of 3695 jobs and generated revenue of €25.3 million for the Basque treasury. The museum concept was clearly a success. As a flagship development, it has contributed to the regeneration of Bilbao and to local economic development.

The economic impacts of the Guggenheim Museum on the city of Bilbao, as well as on the Province of Bizkaia (Biscay) and the Basque territory in general have been studied and internationally recognized. In October 1997, when the museum opened, tourists who spent one night in a hotel in the city of Bilbao and its immediate environs, amounted to 375,460 a year. By 2006, almost a million visitors per year (931,326), decided to spend at least two days, while overnight stays for the entire Province doubled from 708,013 in 1997 to 1,746,282 in 2006. Today, visitation to the Museum exceeds one million and, without any question, it is the main draw for generating tourism in and around the city of Bilbao and surrounding areas.[23]

The physical modification of Agrigento's historical and cultural heritage assets is complex. It involves the social dimension of a resident population, as well as the involvement of a distinct set of stakeholders who play a critical role on how the transformation will be implemented: religious leaders, cultural heritage managers, heritage professionals and groups, private sector and public sector heritage agencies.

Based on our analysis, the PISU-PIST strategic framework does contemplate the critical social, urban, and architectural/cultural heritage interventions to improve and vitalize key areas in the historical center. These include the establishment of tourism cultural circuits, as well as a museum that would highlight the history, art and culture of the city. The strategic framework, however, falls short of establishing the organizational 'entity' that will oversee this enormous cultural heritage transformation. Again, we believe that the creation of an effective DMO is imperative to moving forward the necessary reforms within the Centro Storico.

Experiences from elsewhere in Europe -- Porto, Portugal, a World Heritage Site -- demonstrate the importance of creating an autonomous public body that has sufficient legal and operational authority to implement the urban recovery and renovation of the historic city.[24] In the case of Porto, the Sociedade de Reabilataço Urbana has the following specific functions that include: awarding licenses to private sector firms to undertake urban renovations; conducting inspections and surveys; carrying out legal measures to protect cultural heritage assets; collecting fees, etc.; and coordinating closely with public sector agencies responsible for the provision of basic services (water, sanitation and energy). These are some of the key actions necessary to revitalize an urban area. In our view, this is absent in Agrigento.

We believe that the revitalization of the historical center of Agrigento is vital to the flagship-hub-spokes product development strategy. Primarily, the Valley of the Temples will continue to draw visitors to Agrigento. But as the historic center 'hub' is progressively enhanced, this will expand visitation both within the city and also to other attractions and facilities clustered along spokes that are easily reached by undertaking daily excursions from the historic center 'hub'. As the case studies above confirm, this flagship-hub-spokes design can expand both average length of stay and average amount spent per day. It also spreads the tourism revenue over a broader area, whereas today it is heavily concentrated within the immediate environs of the Valley of the Temples. This, in turn, generates extra demand for services -- accommodation, restaurant, attractions, and retailers -- located throughout the area, with the consequential economic multiplier benefits.

[23] Turismo en Bizkaia (2006). Bizkaiko Foro Aldundia. Diputación Foral de Bizkaia.
[24] http://www.portovivosru.pt/index.php

- **Building the Spokes: Attractions surrounding Agrigento**

Following is a map that depicts the hub and spoke tourism product development strategy.

Figure 2: Tourism Spokes from Agrigento

Based on the two field trips that we carried out from the historic center of Agrigento on separate occasions with extremely knowledgeable tour guides, we were able to experience and confirm the existence of significant clusters of cultural, natural and historic attractions that are within a visitor's reach, as a result of their easy physical accessibility (spokes). These are the assets upon which facilities, amenities, activities and common themes need to be identified, developed and promoted as a market-ready product for the tourist to purchase. In some cases, these attractions need additional assistance to be transformed into deliverable (sold) products to the market. There are other cases, however, where community empowerment and ownership are vital and a necessary element in the process for developing these products. Hence, expert technical assistance is essential to ensure that the creativity and participation of the local community contributes towards the desired 'product'.

The following factors for the case study of *Sant'Angelo Muxàro*, in our opinion, is a prime benchmark of the feasibility for enhancing the highly recommended flagship-hug-and-spokes tourism development strategy:

(i) It is located within 28 km or a short 30-minute drive on a readily accessible route from the hub (Centro Storico) and the flagship attractor (Valley of the Temples);

(ii) Its significant natural and cultural resources have been effectively linked together by *Val di Kam*,[25] a community-based organization led by a young group of passionate and committed entrepreneurs with international tourism experience who consciously returned to the area to empower the community to embrace tourism as a complimentary economic driver. In addition, with sensitivity and creativity they have established the necessary linkages to promote the local culture, foods, handicrafts, etc., to effectively provide an authentic and rewarding community-based experience to visitors, while safeguarding the utilization of the community's natural and cultural resources;

(iii) Val di Kam is generating an average length of stays in the town of 2 to 3 nights. It has done so through developing and marketing well-managed community-based itineraries that protect and preserve the area's socio-cultural environment by attracting two specific niche FIT markets: (a) the adventure/nature segment attracted to the area's scenic landscape and topography to undertake 'soft' trekking, kayaking, horseback activities vis-à-vis the 'hard' mountain climbing, caving, biking and ATV activities; and (b) the cultural segment attracted to learning and exploring the area's 1200 B.C. archaeological tombs and sites; the town's history and architecture; participating in religious and festival celebrations (*Sagra della Ricotta* during Epiphany, Easter, and St. Joseph); enjoying the area's rich gastronomy; purchasing local handicrafts; interacting with the community's residents by staying in home-stay accommodations and the town's B&Bs; and enjoying the scenic landscape; and

(iv) It is a natural and cultural gateway for exploring the hinterland towns within the Valley of the *Platini* River (e.g. *San Biagio*) and access to the *Sicàni* Mountain range.

We identified a number of other tourism "spokes" featuring natural and cultural attractions that are accessible from the historic center of Agrigento. These include: (i) one-day nature-based excursions to visit the protected areas of *Torre Salsa*, *Maccalube*, the *Platini* River Reserve, Mount *Cammarata* and *Sant'Angelo Muxàro* Reserve; (ii) excursions to the castles of *Racalmuto, Naro* and *Favara*; and (iii) one-day excursions to villages that are differentiated by their culinary and cultural festival offerings.

To understand further the potential natural, cultural, historical, and heritage attractions, as well as related recreational activities that are accessible from the 'flagship' – the World Heritage Valley of the Temples -- and from the Agrigento historical center 'hub', we undertook a rapid assessment charting exercise. We used an eleven criteria and a point system from 1 to 10 to evaluate these tourism assets, which have been classified into mainly three types of resources: (i) cultural/heritage; and (ii) natural/recreational; and (iii) a combination of the two types of resources.

The methodology utilized to create this 'Attractions Inventory', is based on The George Washington University and Adventure Travel Trade Association's "Adventure Tourism Development Index." This index is a measurement tool for stakeholders and governments seeking to plan and develop sustainable and competitive adventure tourism destinations. The

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[25] Val di Kam is an association of dedicated individuals focused on the development and implementation of responsible and sustainable tourism in the towns of *Sant'Angelo Muxàro, San Biagio Platini, Cianciana, Casteltermini, Cammarata, San Stefano Quisquina, Bivona* and *San Giovanni Gemini* (http://www.valdikam.it/en).

criteria used to evaluate the resources in the attractions inventory are the following:

1. Quality of management, examining cleanliness, degradation, sustainable operations: from 1=polluted/overused to 10=pristine/used to sustainable capacity.
2. Infrastructure appropriate to site and suitable to foreign markets: captures soft infrastructure elements such as language skills, trail maps, toilets, etc.: from 1=infrastructure unsuitable for site or site lacks necessary infrastructure to 10= adequate infrastructure.
3. Quality of enjoyment for activity, whether it be nature, culture or sport: 1=site offers low level of enjoyment to 10=site offers highest level of enjoyment tuned to site characteristics/personality, fulfills needs.
4. Quality of preservation/conservation: from 1=site has been degraded by use to 10=site is in pristine condition.
5. Uniqueness to foreign markets: from 1= can easily be found elsewhere in the world to 10=found only in Sicily.
6. Authenticity: from 1=contrived/manufactured to 10=true to original nature, un-enhanced.
7. Journey experience to the site: takes into account hard infrastructure such as, quality of roads: from 1=the journey detracts from the experience to 10=journey enhances the experience even if the road is rough, for example.
8. Local benefits: community participates or receives direct benefits from tourism to the site: from 1=community receives no benefit to 10=community receives maximum benefit.
9. Potential for improvement to the site: from 1=investment would greatly enhance site/experience to 10=investment will lead to no improvement. This does not mean that investment must be significant to greatly improve a site. Sometimes a simple sign is a great improvement.
10. Readiness: takes into account hard infrastructure existence such as lodging in vicinity and the level of site product development: from 1=no product development to 10 = they can take guests immediately.
11. Ease of itinerary incorporation: from 1=not easily incorporated to 10=easily incorporated.

Scores for key assets are summarized below. The complete worksheet can be reviewed in Annex 8. Assets were reviewed and scored on a scale of 1-10, with 10 being the highest. Scores 7-10 are "good"; 5-7 is "fair"; 3-4 "needs improvement"; and 1-2 are "poor."

Figure 3: Summary of Attractions Inventory for Agrigento

Cultural Assets	Total Points (1-10)	Nature/Recreational Assets	Total Points (1-10)
Caltabellota	8.2	Riserva Foce dei Platini	8.3
Burgio	8.4	Maccalubbe	7.8
Eraclea Minoa	8.2	Torre Salsa	8.9
Licata	7.1	Monte Cammarata	8.4
Comitini	8.0	Riserva Sant'Angelo Muxàro	5.6
Sant'Angelo Muxàro	8.9		
Sciacca	8.0		
S. Stefano Quisquina	8.5		

The scorecard, which is an important tool for product development, indicates that the tourism assets in these communities and areas are currently evaluated as "fair" to "good." The scorecard helps to identify gaps, expose weak links in several areas, and, as a consequence, establish development priorities.

These kinds of assessments are normally undertaken with the participation of multiple stakeholders at the community level and experts in various disciplinary fields like in the case of archaeological and biological resources, whereby scientific research is required. Involving communities in defining their cultural and natural assets and prioritizing initiatives for conservation can increase not only their appreciation of heritage, but also their willingness to take responsibility for their stewardship and, accordingly, address issues related to: what is to be shared with visitors; how many and how often visitors will come; what kinds of services and cultural entertainment should be provided; and how to manage negative impacts and conflicts.

Because of time, our exercise was based on local knowledge of expert individuals who are extremely acquainted with the attractions and resources that these communities and/or sites possess.[26] Further analysis of the area's tourism resource base is therefore warranted for achieving a critical understanding of how best to manage them within a tourism policy and management framework that: "will create an environment that provides maximum benefit to the stakeholders of the destination, while minimizing the effects, costs and negative impacts of visitation, thus ensuring that the destinations' environmental, social and cultural integrity is not compromised."[27]

The following case study from Estonia illustrates how careful management of recreational activities on and around a large lake has been used to ensure good quality and create wide economic benefits for the local community. This case study also exemplifies how, through the establishment of a local foundation, EU funding was obtained to implement the tourism management plan for the resource.

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[26] Interviews with Marco Falzone and Pierfilippo Spato.
[27] Ritchie and Crouch, 2003.

Case Study 3: Lake Võrtsjärv Foundation – Estonia

Lake *Võrtsjärv* is the largest lake in Estonia with a shoreline of 100 km and is a designated Natura 2000 bird and nature reserve. Although the lake has attracted visitors for many years its full potential as a recreational resource had not been fully developed. The seven municipalities bordering the lake, *Rannu, Rõngu, Puka, Põdrala, Tarvastu, Viiratsi* and *Kolga-Jaani*, recognized that the development of Lake *Võrtsjärv* as a common resource was in their joint interests, and they actively co-operate in the development of tourism and recreation. The Lake *Võrtsjärv* Development Plan 2000–2005 led to the creation of the Lake *Võrtsjärv* Foundation to manage the lake's development; jointly funded by the seven municipalities and via grants sought from national and international aid funds. The plan introduced the concept of five '*Võrtsjärv* Gates' in different lake areas. These visitor centers and recreational areas, operating as a network of regional tourism destinations with different attractions, are connected by a cycle track and include landing stages to facilitate movement around the lake. Construction of the '*Võrtsjärv* Gates' began in 2005–2006 with a € 187,000 grant from the European Regional Development Fund (ERDF). The Lake *Võrtsjärv* Visitors Centre, built in 2009, was funded by the EU Structural funds, the EU LEADER program and the seven municipalities and is administered by Lake *Võrtsjärv* Foundation. The visitor centre provides information about the lake's biodiversity, recreation and tourism. It is possible to book different tourism services and to lease the building for training courses and seminars.

The Lake *Võrtsjärv* Foundation has been successful in attracting a range of funding including a €874,000 grant from EU structural funds for the Development of the Gates of Lake *Võrtsjärv*, Stage II (2008–2010). This project included further development of the recreational areas, bicycle path signage and production of related maps. In 2010 Lake *Võrtsjärv* won the best EDEN (European Destination of Excellence) award in Estonia for aquatic tourism. The judges highlighted the strong and diverse tourism products, well functioning cooperative networks and preservation of cultural traditions. The range of tourist packages, which are of interest to visitors seeking cultural, nature and active holidays, were developed with input from the local municipalities, non-profit associations and local private sector tourist firms. The redevelopment of Lake *Võrtsjärv* is a good example of collaboration between different local authorities in pursuit of a common goal.

Source: Based on following websites: www.vortsjarv.ee and www.edenineurope.eu.

Based on the above, it is clear that by developing and enhancing this strategy, the destination will further strengthen its competitiveness. This situation, in turn, will generate the desired economic benefits for all those businesses that are linked to the flagship-hub and spoke product. A clear demonstration of this approach in terms of the type of journeys that can be developed is exemplified by the those that have been packaged by Private Sicily, a tour operator that uses Palermo, Catania and Ragusa as the 'hubs' from which visitors are based and then travel to the different attractions that are near-by: http://www.privatesicily.com/subsite/html/Pacchetti.html.

4. Work Force Development: Increasing Employment/Reducing Poverty

Tourism is a labor-intensive industry supporting a wide variety of jobs in many different sectors. Globally, tourism generates about one in twelve jobs,[28] while in Italy tourism accounts for almost one in ten (2.2 million persons) direct and indirect jobs.[29] "No sector spreads wealth and jobs across poor economies in the same way as tourism," says Francesco Frangialli, who served as Secretary General of the UN World Tourism Organization (UNWTO) from 1997 to 2009.[30]

While the quality of some jobs may be questionable, tourism provides opportunities for youth, women, and less advantaged groups in society.[31] For such people, tourism is a fast entry vehicle into the workforce, both in urban and rural communities, directly, or through its strong multiplier effect on related services, manufacturing, and agriculture.[32] Workforce development that is well coordinated and integrated with the needs of the tourism industry and government programs and funding leads to stronger economic growth, increased productivity, and expanded employment opportunities. It can prepare new entrants for tourism jobs, bring new skills to the existing workforce, and support entrepreneurship.[33] Baum and Szivas[34] argue that tourism's ability to create employment opportunities and hence contribute to the overall economic and social development is a key motive behind government support for tourism in any country, regardless of whether the country runs a fully diversified and developed economy or is a less developed country.

The OECD study on tourism in Italy recognizes that the area of human resource development relative to education and training for tourism is critical: "*At present there is both a quality and a quantity gap in the education and training available in Italy. Despite the fact that the number of tourism university courses has rapidly increased in recent years, the number of students has declined. The demand for higher education skills from the sector is also very weak, with the orientation of the courses not sufficiently market-oriented, and tourism businesses not playing an active role in the definition of content or course development. There is a need to enhance the*

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[28] World Travel and Tourism Council, *Travel and Tourism Economic Impact Study for Italy – 2011,* London, UK, p.3.

[29] World Travel and Tourism Council, "The 2008 Travel and Tourism Economic Research Executive Summary". February 1, 2008. http://www.wttc.org/bin/pdf/original_pdf_file/exec_summary_final.pdf.

[30] "Travel Sector Key To Reducing Poverty," *Manila Standard,* January 10, 2007.

[31] Cooper, C. and Hall, M., *Contemporary Tourism: An International Approach,* Elsevier. Oxford, UK, 2008.

[32] Bonifaz, A., Hawkins, D., and Israel, R. *Guide to Assessing and Designing Tourism Workforce Development Programs – With a Special Focus on Job and Career Opportunities for Youth*. Education Development Center, Boston, 2010.

[33] Idem.

[34] Tom Baum and Edith Szivas, "HRD in tourism: A Role for Government?" *Tourism Management*, 29, 2008, pp. 783-794.

transfer of knowledge from the education sector to the industry and develop an integrated approach closely associating the regions, the private sector and the education and training organizations."[35]

Based on our discussions with the Foundation, vocational training providers, and other key stakeholders in Agrigento, it is clear that the development of a high qualified tourism workforce focused on youth employment is considered vital for improving the local tourism industry's sustainability and competitiveness and reducing poverty in the region. Those interviewed concur that expanding tourism in the Agrigento destination can provide youth with economic opportunities, new skills, and good jobs. Italy has the highest youth unemployment rate in Europe: 29.6% of Italians below the age of 25 are unemployed, compared with a European average of 21%. Within Italy, Sicily is the region with the highest unemployment: 28% of adults under 35, compared with the national average unemployment rate of 15.9% for adults under 35.[36]

The Province of Agrigento, in turn, holds the unenviable position of having the highest unemployment rate in Italy: 17.6% in 2009 and 19.2% in 2010, -- almost triple the national average of 7.8%.[37] The Foundation has therefore estimated that 500 to 600 new tourism jobs need to be created for local people with an emphasis on young people.

In our meeting with vocational training providers at the University of Agrigento (*Polo Universitario della Provincia di Agrigento*), we learned that both the three and five year vocational training certificates are concentrated mainly in the accommodation and food and beverages sub-sector.[38] Neglected are opportunities in training in other areas of the local tourism value-chain, such as natural protected areas or event management. We also learned that internship and career job opportunities for both vocational and tertiary students are extremely limited.

The situation described is extremely complex due to a variety of factors that are beyond the scope of this report to evaluate. What we were told and observed regarding employment and tourism training and education describe a complex and uneven picture of workforce development needs. These include:

- **Guides:** There are up to 100 well-trained and licensed guides working at the Temples. They are paid by the government, but cannot make a full time living because most tourists visit the archeological park for only a few hours. In addition, not enough guides speak sufficient English or other languages and only a half dozen or so specialize in other types of tours (the spokes). Further, there are three guide associations, making it difficult for guides to lobby for better training and work conditions;

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[35] OECD (2011), OECD Studies on Tourism: Italy: Review of Issues and Policies, OECD Publishing. http://dx.doi.org/10.1787/9789264114258-en. p. 135.

[36] Figures retrieved from *Confartigianato*, the small business association. http://www.confartigianato.it/index.asp.

[37] According to the 2009 data provided by the National Institute of Statistics (ISTAT); "Agrigento,:" Wikipedia, http://en.wikipedia.org/wiki/Agrigento.

[38] Students who graduate with the 5-year certificate program earn a Science for Tourism Diploma, qualifying them to continue to specialize in other areas such as marketing and to open their own hotel and/or restaurant business.

- **Archeologists:** None of the 40 to 50 students who graduate each year with a Cultural Heritage degree from the University of Agrigento have found employment at the Valley of the Temples Archaeological Park and elsewhere, despite the wealth of archaeological assets that are present in the entire region.[39] The same situation occurs with those students graduating in architecture: they are not at present able to find full-time employment in the renovation of historical buildings and residences in the historical center;

- **Hotel Staff and Owners:** The vocational schools have had success in placing student interns in hotels. Most of those who get degrees in Tourism Science have the skills to open hotel or restaurant and have made commitments to their families that they will do so. But many move elsewhere in Italy or Europe;

- **Chefs and Restaurant Owners:** The vocational schools have a good relationship with the chefs' association and at least one school focuses on local cuisine. But there is no organized effort to promote restaurants featuring local foods, even though the Slow Food Movement began in Italy. Professors in vocational programs say they have not been successful in coordinating their courses with local restaurants and chefs;

- **Specialists in economics and accounting** for tourism have had difficulties getting internships with big companies; and

- **B&B owners:** This is perhaps the most dynamic sector of the tourism workforce, with an estimated 150 B&Bs in the whole city, and 15 in the historic center with a total bed capacity for 200 people. While owners have benefited from generous government support, there appears to be limited vocational training in B&B management (quality and service) and none for sustainability standards.

The entrepreneurial spirit of those we met in various tourism businesses impressed us. These included a number of professionals who have consciously decided to remain in or return to Agrigento and develop innovative tourism products that blend local culture, cuisine, and traditions with a sophisticated sensitivity to the international market. They have done so with impressive innovation and without, it seems, professional or vocational training. These include:

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[39] Those interviewed said that the Valley of the Temples' 100 employees includes no archeologists and the *Soprintendenza's* 300 employees for the entire province include only four archeologists. But none are from the University because there have been no new openings.

- Gaetano Pendolino: a former insurance agent who, with a group of friends, turned to tourism and began offering culinary and wine tours targeting the international market. Today he is a leader in Agrigento's tourism sector. Currently is he the founder and President of the *Consorzio Valle dei Templi*, which includes about 50 tourism businesses, and he has been designated Executive Director for the Valley of the Temples Tourist District;
- Pierfilippo Spato: who owns a café showcasing local food and wines, manages a ten-guest house in the village of Sant'Angelo Muxàro, and runs cultural and adventure tours targeting an international market;
- Alessandro Tedesco: who runs mountain bike tours with Coast2Coast specializing in off road tours and is trying to build a bike path through the Archaeological Park of the Valley of the Temples, as well as a bicycle hub in Santo Stefano Quisquina;
- Emanuel Farruggia: an Events Organizer who has helped to organize the Almond Festival and a variety of other festivals and events around Agrigento province;
- Giovanni Moscato: who runs the intimate theatre Posta Vecchia in the historic city center that features a range of music and theatrical performances, as well as a B&B (Allogio della Posta Vecchia);
- Pietro Fattori: who has rescued and recovered the nineteenth-century railways and train station in Porto Empedocle, transforming it into a Railway Museum and providing the Akragas Express, an historical train ride to the Valley of the Temples;
- Giovanni Sciacca: President of the Agrigento Hotel Association and owner of Antica Perla, the only residential hotel that takes its inspiration from Syracuse; and
- Morgan Lopez: who runs with his four sons a scuba diving business operation focusing on the exploration of shipwrecks off the coast of Agrigento and the organization and promotion of national and international tournaments for both surfing and kite surfing in the coastal area of San Leandro.

In our opinion and those of the educators and hospitality enterprises that we met, a supportive tourism education and workforce policy framework and network system is required to advance the goal of building human resource capacity in the tourism sector in Agrigento.

Figure 4: Workforce Development System
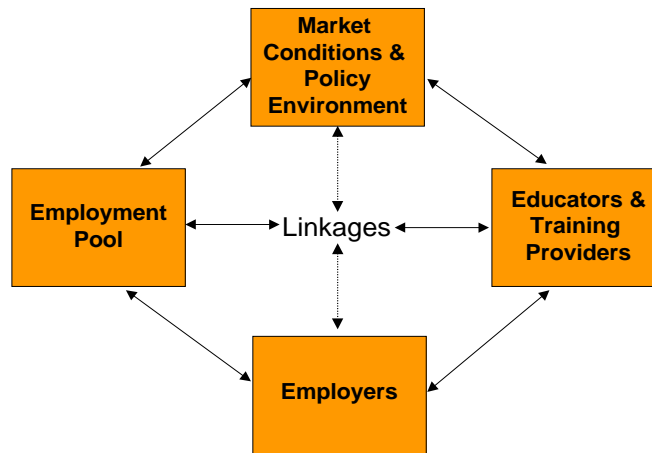
As illustrated above, a workforce development system consists of employers, policymakers, educators, and workers. It is the collaboration and communication linkages among the four clusters that determine the system's ability to respond to changes in the market environment. The effectiveness of the system depends on the interrelationships (the linkages) among the stakeholders, as well as on the quality of information that passes between them, and on their willingness to cooperate and create competitive advantages for themselves. In our view, Agrigento needs its own workforce development system in order to successfully identify the needed skills, provide training, and secure employment within the Agrigento tourism destination.

To accomplish this goal, we believe that it is necessary to undertake a tourism workforce assessment that will identify the gaps between the training and the needs of the local tourism industry. Such an assessment will point to the specific needs that must be addressed to create both a well-trained workforce and a tourism workforce development system linking market conditions and employer needs to training and creation of an employment pool.

5. Developing and Enhancing Websites

The advent of the Internet and the use of web-based and mobile, interactive technologies have dramatically changed the way travelers plan their trips and consume tourism products and services. Consequently, it is the traveler – rather than the tourism destination or product -- that is now often 'in control' of the process of creating and shaping brands and experiences (Gretzel, et al.).[40]

According to a UNWTO report on tourism product development, "The use of websites to research and plan trips, and to make reservations, has grown exponentially in recent years – and this growth will continue. US travel booking online revenues more than doubled between 2003

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[40] Gretzel, U., Fesenmaier, D.R., and O'Leary, J.T. *The Transformation of Consumer Behaviour* in Tourism Business Frontiers. Edited by Dimitrios Buhalis and Carlos Costa. Oxford, Elsevier. Ltd.,2006, p. 10.

and 2009 to approaching US$ 100 billion. *The implications for all destinations are that unless they fully embrace electronic technology in all aspects of tourism planning, delivery and marketing, they will lose ground to competitors.*"[41] The UNWTO study states further: "With the universal usage of the internet and social networking sites, the spread of communication by visitors to a destination is becoming ever wider and more immediate. In consequence, the importance of delivering visitor satisfaction is intensifying."[42]

An interesting study of European travel trends makes the important observation that Italians use the internet less than other European travelers. The 2011 European Travel Commission study states, "Different online sources show that Italians are less keen than Europe's other leading markets to book online, and they are also among the most frugal when it comes to actual online spending."[43]

Based on our online investigation before and after our visit, Agrigento is today not competing effectively in cyberspace, and is therefore losing ground to competitors. This will become an even greater problem as Agrigento seeks to attract more international and independent (FIT) visitors.

The results of our review of Agrigento's online presence can be summarized as follows:

- Internet information for the city of Agrigento and other 'destinations' within the Province of Agrigento is extremely limited, dispersed, and difficult to find;
- Most database information for Agrigento tourism is found through third party and international travel websites. For instance, LonelyPlanet.com and TripAdvisor.com.
- The official website for the *Comune di Agrigento*, especially the section for tourists (*Servizi per il Turista*) lacks content and functionality; it is only in Italian, and is not helpful at all from an international tourist's consumer point of view;[44]
- The *Consorzio Turistico Valle dei Templi* web site, although well-structured and user-friendly, is still under construction and not geared to international travelers (only in Italian);[45]
- The Valley of the Temples web site provides a comprehensive overview and detailed information of the natural and cultural resources of the Valley of the Temples, but the content of several sections are still only in Italian, which limits the total comprehension and navigability of the web site by international visitors;
- The official Sicilian Autonomous Region's tourism web site (*Assessorato Regionale dei Turismo dello Sport e dello Spettacolo*),[46] offers significant although disjointed information on various attributes related to Agrigento;
- There is no useful information on YouTube for Agrigento;
- Sites for tour guide companies are not easy to find and there are no legitimate reviews of the tours or guides; and

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[41] Italics emphasis added. UNWTO, *Handbook on Tourism Product Development*, 2011, p. 9.
[42] UNWTO, Handbook on Tourism Product Development, 2011, p. 64.
[43] ETC, European Tourism Insights 2009-10, 2011, p. 39, www.etc-corporate.org
[44] http://www.comune.agrigento.it
[45] http://www.consorziodeitempli.ag.it
[46] http://pti.regionale.sicilia.it.

- There is no comprehensive database for wineries in the Province or for the entire region of Sicily.

Based on our review, it is not clear whether the *Consorzio Turistico Valle dei Templi* web site – in our view, the best of the existing websites available in terms of structure -- will be further enhanced and be used as the 'designated destination' web site for the entire Tourism District. In our opinion, this is an important issue that needs to be addressed without delay.

Our evaluation is further informed by the assessment undertaken by the tourism planners for the Valley of the Temples Tourism District. Based on their research many web sites of tourism businesses (mainly hotels), cultural associations, and other local authorities in Agrigento have partial, inconsistent, and often disjointed information with the aggravating circumstance that it creates confusion among the travel-related consumer. In addition, the web sites are not 'rich' in content to influence travel behavior for visiting the destination; they lack direct booking capabilities and do not offer greater transparency on the quality of what is being offered. According to this assessment, the current confusing and inadequate situation is a direct consequence of not having in place a strategic action plan. As a result, the planners for the Tourism District have developed a proposal and a budget to address these findings.

The destination of Agrigento, marketing the "flagship-hub-spokes" concept, requires a web site that can provide a rich image supported by high quality and reliable information. This needs to be done within an interactive format and with content that focuses on the variety of experiences the Agrigento destination offers. Such a robust and engaging website will help to provide a competitive advantage over other destination web sites. As indicated previously, today's traveling consumer who access content on the Web for the purpose of planning a trip is extremely savvy and prefers to spend less time searching through numerous web sites. A destination web site needs to create value to the user, assisting them with making their travel decisions in ways they deem useful. In other words, functionalities should reflect the tourists' desire for timesaving, convenience and independence as they plan and then carry out their travel.

Given this situation, we would like to point out three web sites that in our opinion provide excellent benchmarks. The first one is a non-commercial web site that was established by local residents with the purpose of satisfying an information gap on the international destination of Taormina (http://www.taormina.it). It is extremely well structured and organized. It provides comprehensive content in English and the 'sense of place' for the destination is properly emphasized.

The second web site (http://www.discoverhongkong.com/eng/index.html) is for the city of Hong Kong. In our opinion, this is the most complete destination web site that brings together all the information necessary for the traveler consumer to plan his trip and make the necessary online arrangements and bookings in order to have a memorable experience.

The last website, for the city of Washington, DC would be the most appropriate for the historical center of Agrigento (http://www.culturaltourismdc.org).   The programs we would like to highlight are the Neighborhood Heritage Trails, the Downtown Heritage Trail and the WalkingTown/BikingTown DC campaigns. These offer excellent examples of what could easily be done to promote Agrigento's historical center in the near short-term. Further recommendations

for establishing an equivalent web site that the Foundation could support are provided in the Action Plan.

6. Ensuring and Enhancing Sustainability

Sustainable tourism is defined by the UN World Tourism Organization (UNWTO) as "*tourism which leads to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.*"

Sustainable tourism should be low impact on the environment and local culture, while helping to generate good jobs and income for local people. The aim of sustainable tourism is to ensure that development brings a positive experience for local people, tourism companies, and the tourists themselves.

While the various strategic plans for the Agrigento destination discuss using specific "green" technologies such as renewable energy and electric cars, they contain no overarching sustainability strategy. Similarly, based on our interviews and observations, we found some fine examples of sustainable tourism initiatives such as the Coast2Coast bike tours and Val di Kam's cultural and archeological tours around the village of Sant'Angelo Muxàro. But these were specific projects, not tied to an overall sustainable tourism strategy for Agrigento as a tourism destination.

This is an area where major work needs to be undertaken in terms of educating key decision makers and tourism practitioners, developing an overall strategy for Agrigento, applying sustainability criteria to all new tourism projects in the Agrigento destination, and then measuring through certification programs, the social, environmental, and economic sustainability of tourism businesses. Fundamentally, we believe that sustainability principles and practices need to be "baked in" to the core – into "the DNA" -- of Agrigento's tourism strategy. This is not only a way to protect and enhance the cultural and natural assets, but it is also a way to differentiate Agrigento from other destinations and to increase its attraction and appeal to a more discerning segment of "high value" Italian and international travelers.

Developing an effective sustainable tourism strategy must be grounded in the analysis of latest trends within the tourism industry. This includes consumer/traveler interest in socially and environmentally responsible travel as well as tourism certification programs that are promoted by UN agencies and other international development organizations, major tourism associations, international environmental NGOs, and a growing number of governments. Because of the complexity of the sustainability component, we are devoting the next chapter to both laying out the evidence and arguments, and then proposing steps that we recommend to be implemented in Agrigento. We believe that the Foundation can play an important catalytic role in infusing the principles and practices of sustainability into tourism in the Agrigento destination. As we elaborate in the next chapter, we believe that in the future, Agrigento can be recognized not only as an archeologically significant and culturally rich destination, but also as a "green" city.

Case Study 4: Copenhagen: The Greenest City in Europe

Copenhagen, Denmark holds the honor as the "greenest city" in Europe. According to the 2010 European Green City Index, a study of 30 major European cities by the Economist Intelligence Unit, Copenhagen ranked the highest in environmental performance. Rome ranked 14th. The cities were assessed on the basis of 30 indicators divided into eight categories: CO_2 Emissions, Energy, Buildings, Transportation, Water, Air, Waste/Land Use, and Environmental Governance.

Ecologist magazine writes, "Cutting edge architecture, miles of cycle routes and green spaces galore have made the Danish capital a hotspot for green travelers." Copenhagen also has one of the most clean water that, according to Fodor's, "residents and visitors alike can dive in for a swim without bumping into floating trash or other filthy items." Copenhagen has ensured that select beaches remain clean enough for bathing and hopes to have all sea water within city limits meet the same standards by 2015. The local cuisine from this Danish capital also focuses on locally grown, organic, and seasonal ingredients. Other sustainable practices that make Copenhagen the greenest city in Europe is that this Danish capital happens to be a "world-leader in clean technology" and has pioneered eco-initiatives such as financial incentives to recycle plastic bottles and generous tax reductions when residents switch to electric cars such as the Tesla.

Sources:
Ruth Styles, "Copenhagen: Europe's coolest green city," *Ecologist*, Febuary 16, 2011.
"European Green City Index," *Siemens*, Spring 2010, http://www.siemens.com/innovation/apps/pof_microsite/_pof-spring-2010/_html_en/european-green-city-index.html.
Fodor's: Travel Intelligence. April 19. 2011. http://www.fodors.com/news/story_4533.html.

The International Tourism Market: Consumer Trends and Industry Standards

Tourism experts and planners, as well as government and business leaders whom we interviewed in Agrigento expressed a desire to build a tourism industry that successfully integrates three components:

- Attracts a different type of tourist
- Offers a range of tourism experiences
- Expands the amount of time tourists spend in Agrigento

"Now only Temples and the archeological museum draw people to Agrigento," says tour guide Michele Gallo. "We should break this system of mass tourism by offering Agrigento for several days." Hotel owner Fabrizio La Gaipa complains, "Our guests only want to sleep, eat and drink, go to the Temples, and the beach. I want to elevate type of guests we attract." Industrialist Salvatore Moncada says, "The tourists coming to Agrigento are middle class. They stay only 1.5 days – and the attitude of local people is to take as much as they can from these tourists." And Agrigento's Mayor Marco Zambuto comments that "the city is getting nothing from tourism taxes at the moment."

What type of tourists do these tourism experts and civic leaders want? "My vision," says tour guide Gallo, "is to combine literary theme tours, sulfur mines, historic villages, archeology, organic agriculture, wineries, pastries, and ceramics." Mimmo Fontana, President of Legambiente, Italy's leading environmental organization, concurs: "We need new kind of tourist. Not just ones who come only to see the Temples, but those who come to the nature reserves and those who come on their own." A similar vision is found in the four strategic plans we examined.

Fortunately, the views voiced by Agrigento's civil leaders and tourism professionals and incorporated into the various strategic plans coincide with important trends in international and European tourism. An examination of recent public opinion surveys as well as global, Italian, and Sicilian tourism studies show that Agrigento has the potential in terms of its natural, cultural, and human resources to develop a more successful and sustainable tourism industry based on targeting "high value" rather "high volume" tourism. As elaborated below, "high value" tourists are concerned about traveling in ways that do not harm the environmental, are socially and culturally sensitive, and bring tangible economic benefits to the people in the tourism destination.

Background: Importance of Tourism

Tourism is the world's largest service sector industry in terms of international trade,[47] accounting for about 10% of GDP.[48] In 4 out of 5 countries (over 150) tourism is one of five top

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[47] "Tourism is NOT the World's Largest Industry - So Stop Saying It Is!," May 1, 2008, Tourism Place, http://tourismplace.blogspot.com/2008/04/tourism-is-not-worlds-largest-industry.html.

[48] World Travel and Tourism Council, "The 2008 Travel and Tourism Economic Research Executive Summary," February 1, 2008, http://www.wttc.org/bin/pdf/original_pdf_file/exec_summary_final.pdf.

export earners.[49] Over the last half century, international travel has skyrocketed. Once limited to a small number of privileged people such as the wealthy Europeans who in the 18th and 19th centuries took the Grand Tours to Italy and elsewhere. Today, thanks mainly to advancements in air transportation and paid vacations for workers -- travel is within the reach (and pocketbooks) of hundreds of millions. Since 1950, international travel has increased almost 40-fold, and it continues to grow despite a range of man-made and natural disruptions. According to the UNWTO, "International tourist arrivals reached a total of 980 million in 2011, up from 939 million in 2010, in a year characterized by a stalled global economic recovery, major political changes in the Middle East and North Africa and natural disasters in Japan."[50] International arrivals are forecast to reach 1 billion by the end of 2012,[51] and 1.6 billion by 2020.[52]

In 2011, Europe and the Americas were the best performing regions in the world, and Southern or Mediterranean region accounted for the largest number of international tourist arrivals – 36% -- and the largest percentage growth over 2010 – 8.1% -- in Europe.[53] Tourism is extremely important to Italy, ranking as the country's #1 service sector and accounting for 10% of GDP[54] and 9.7% (2.2 million persons) in direct and indirect jobs.[55] Globally, Italy ranks 5th both in number of international tourist arrivals and amount of tourism receipts.[56] In 2011, over 45 million international tourists visited Italy, spending EUR$34.5 billion, including on transportation.[57]

Fortunately, tourism in Italy has, so far, been only "very lightly affected" by the global economic recession and European debt crisis. The European Travel Commission reports that this is because Italy "is close enough to major markets in Western Europe to benefit from the trend towards staying closer to home, and fashionable enough among the affluent in long- haul markets to have sustained demand from those markets."[58] An OECD study of tourism in Italy states further that while "domestic tourism represents the major share of Italian tourism, the Italian tourism economy is highly internationalized, and inbound tourism to Italy has performed well over the last 20 years."[59] The study states further that "Italy has a rich diversity of multi-optional tourism products. With over 5,000 museums and similar institutions, and more UNESCO World Heritage sites than any country in the world, over 46% of international visitors come to Italy to experience cities of historical and artistic interest." While it "is clear that Italy continues to have a very strong international brand, " the study notes, "the process of globalization has led to increased competition, and Italy, like many traditional destinations, must maintain an effective presence in international markets to ensure that products are visible on the global stage." [60]

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[49] World Tourism Organization, "Tourism, a Force for Sustainable Development," 19th OSCE Economic Forum, Prague, Czech Republic, June 2, 2004.

[50] UNWTO, *World Tourism Barometer*, Volume 10, 2012, p. 3, www.unwto.org/facts/menu.html.

[51] UNWTO, *World Tourism Barometer*, p. 5.

[52] United Nations World Tourism Organization, "2020 Vision," http://www.unwto.org/facts/menu.html.

[53] UNWTO, *World Tourism Barometer*, p. 4.

[54] Economy Watch, http://www.economywatch.com/world_economy/italy/structure-of-economy.html, 2010; OECD, *Studies on Tourism: Italy: Review of Issues and Policies*, 2011, p. 13.

[55] World Travel and Tourism Council, *Travel and Tourism Economic Impact Study for Italy – 2011,* London.

[56] UNWTO, "Statistical Annex," *World Tourism Barometer*, pp. 8,9.

[57] WTTC, *Study for Italy – 2011*.

[58] European Travel Commission (ETC), *European Tourism Insights 2009-10, 2011*, p. 11, www.etc-corporate.org.

[59] OECD, *Italy*, p. 20.

[60] OECD, *Italy*, p. 14.

Within Italy, Sicily scores very high among visitors. Most tourists report having had a satisfying trip, with climate, cultural heritage, hospitality and gastronomy listed as the top attributes for both domestic and international visitors. However, both groups of tourists did rate the island of Sardinia higher in satisfaction than Sicily (75% and 61%, respectively).[61]

For the province of Agrigento, the average length of stay increased slightly from 3.3 nights in 2009 to 3.4 nights in 2010.[62] Interestingly, Italians spent more nights in Agrigento Province than international visitors: 4.2 nights versus 2.8 nights. This may be an indicator that tourism products and services currently being offered in Agrigento are not attractive enough and/or are not advertised or packaged well enough to convince international visitors to extend their overnight stays. Another factor could be seasonality. Further research and analysis is required. In 2010, the five most important international markets for the province of Agrigento were: France (42,629), Germany (21,266),) USA (12,663), Spain (9,948), and UK (8,992). [63]

Demand for Sustainable or Responsible Travel

In talking about "sustainability", it usually means that we can do the activity in the same or similar way for the indefinite future (sustainable in time) in three main aspects:

o **Environmentally** – the activity minimizes any damage to the environment (flora, fauna, water, soils, energy use, contamination, etc.) and ideally tries to benefit the environment in a positive way (through protection and conservation).
o **Socially and culturally** – the activity does not harm, and may revitalize the social structure or culture of the community where it is located.
o **Economic** – the activity does not simply begin and then rapidly die because of bad business practices; it continues to contribute to the economic well-being of the local community. A sustainable business should benefit its owners, its employees, and its neighbors.

When we take these three aspects into account, this is called the **"triple bottom line."** It means running a business, an organization, a city, or a government in such a way that it doesn't destroy the resources – natural, cultural, or economic – on which it depends. In fact, a business that is run in this way can enhance all three aspects.

The principles of sustainability can be applied to any type of tourism – mass or specialty; city, beach, or nature; large or small. They also can be applied to all sectors of the tourist industry: lodging, tours, agencies, ground operators, guiding, and transport. According to *Agenda 21 for the Travel & Tourism Industry*, "Sustainable tourism products are products which operate in harmony with local environment, community, and cultures, so that these become the permanent beneficiaries."[64]

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[61] Conferenza stampa, *Ricerca di marketing sull'attrattività turistica della Sicilia,* 10 Novembre 2011, Palermo, www.attrattivitasicilia.com.

[62] Statistic retrieved from the Foundation's power point presentation (slide #13) on occasion of the stakeholder meeting held in December 2011.

[63] See Annex 2: Destination Review for source and more details.

[64] WTTC, WTO, Earth Council, *Agenda 21 for the Travel & Tourism Industry, 1996,* www.wttc.org/agenda21.htm.

The UNWTO has a useful list of 12 components that make up sustainable tourism:[65]

1. Economic Viability: To ensure the viability and competitiveness of tourism destinations and Enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

2. Local Prosperity: To maximize the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally.

3. Employment Quality: To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

4. Social Equity: To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

5. Visitor Fulfillment: To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability, or in other ways.

6. Local Control: To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

7. Community Wellbeing: To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

8. Cultural Richness: To respect and enhance the historic heritage, authentic culture, traditions, and distinctiveness of host communities.

9. Physical Integrity: To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.

10. Biological Diversity: To support the conservation of natural areas, habitats, and wildlife, and minimize damage to them.

11. Resource Efficiency: To minimize the use of scarce and non renewable resources in the development and operation of tourism facilities and services.

12. Environmental Purity: To minimize the pollution of air, water, and land and the generation of waste by tourism enterprises and visitors.

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[65] UNEP and UNWTO, *Making Tourism More Sustainable: A Guide for Policy Makers* 2005, http://www.hospitalitynet.org/news/4024647.html.

In addition, within the tourism industry, there has been, over the last several decades, a proliferation of tourism terms, all linked to the concept of sustainability. The following Figure 5 gives definitions for some of the most common of these. What is important to note is that while there are nuances of differences among these terms, they all are based on the concept that tourism should be environmentally, socially, and economically sustainable. In this report, we use interchangeably the terms "sustainable" and "responsible" tourism.

Figure 5:   **Different Terms ~ Same Principles**

- **Sustainable tourism:** Tourism that "meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future." (Agenda 21 for Travel & Tourism Industry)

- **Ecotourism:** Responsible travel to natural areas that conserves the environment and improves the welfare of local people. (The International Ecotourism Society/TIES)

- **Geotourism:** Tourism that sustains or enhances the geographical character of a place, its environment, heritage, aesthetics, and culture and well-being of its residents. (National Geographic)

- **Pro-Poor Tourism:** Tourism that results in increased net benefits for poor people. (South Africa)

- **Responsible Tourism:** Tourism that maximizes the benefits to local communities, cultures & habitats or species. (UK)

Consumer Trends for Sustainable Tourism

Within the broader picture of tourism both globally and within Italy, there are important trends that should be paid attention to in determining how to grow tourism in Agrigento so that it benefits the local residents and respects the culture and the environment. CREST's research has found that demand for responsible travel is higher and stronger relative to conventional tourism, and travelers interested in responsible vacations have shown their dedication to sustainability -- even in difficult economic times. When, for instance, the U.S. market research group, CMI, asked responsible travelers how the global economic crisis would affect their travel plans, 54% of respondents reported taking a "greener" vacation within the last 12 months; 60% said they would maintain their level of "green" purchasing, while 30% said they planned to increase responsible purchases.[66] "Green is no longer just a trend," says Fran Brasseux,

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[66] CMI, "Green Traveler Survey," p. 5.

executive director of the Hotel Sales and Marketing Association International (HSMAI) Foundation, "it's a way of life."[67]"

In addition, long term sustainability of a tourism business or destination is, as the UNWTO notes, dependent on "matching the delivery of enjoyable and satisfying experiences with the customer's expectations."[68] Quality and service are equally important components, along with social and environmental sensitivity, to delivering a sustainable product.

A variety of market studies over the past ten years have documented sustained interest among consumers in tourism products and services that preserve the environment and respect local cultures. Here is a sampling:

- 74% of *Conde Nast Traveler* (a popular U.S. travel magazine with a luxury angle) readers indicate that corporate responsibility policies influence their purchasing decision,[69] and 44% of all US consumers consider environmental impact to be important when planning travel.[70]
- 96% of those who read *Conde Nast Traveler* believe that hotels and resorts should be responsible for protecting the environment.[71]
- More than 66% of all American and Australian tourists, and 90% of British travelers consider active protection of the environment, including support of local communities, to be part of a hotel's responsibility, according to the World Travel and Tourism Council (WTTC). [72]
- 43% of people in the U.S. who identify themselves as at least "eco-conscious" are willing to pay a 5% premium for responsible travel, and 40% are willing to pay up to 10% more.[73]
- Research by the Stanford Research Institute and Angus Reid consistently find that between 10% and 15% of travelers want the unusual – these are the alternative or new tourists, and growth from these groups is out-speeding that of mainstream segments. These tourists are "typically highly educated, mature, affluent, well traveled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit."[74]
- "The build up of consumers' socio-environmental awareness of tourism development is leading to increased scrutiny on the part of the public in destination decision making and a growing requirement for new tourism developments to be sustainable," states the UNWTO.[75]

[67] Responsible Travel Report, "STI Partners with PhoCusWright and HSMAI Foundation," April 2008.
[68] UNWTO, *Communicating Heritage: A Handbook for the Tourism Sector*, 2011, p. 1.
[69] Dorinda Elliott, "Ethical Traveler Index," *Conde Nast Traveler*, May 2007.
[70] PhoCusWright, "*Going Green: the Business Impact of Environmental Awareness on Travel,*" 2009.
[71] Elliott, "Ethical Traveler Index."
[72] World Travel and Tourism Council, *Travel & Tourism Economic Impact,* 2010.
[73] CMI Community Marketing Inc., "Green Traveler Survey*," 2010.*
[74] UNWTO, *Handbook on Tourism Product Development*, 2011, p. 11.
[75] UNWTO, *Handbook*, 2011, p. 11.

- The UNWTO states further, "While we cannot expect all tourists and tourism stakeholders to become ambassadors for conservation and good environmental management, trends in contemporary tourism suggest that these issues are growing in importance within the international community and are of increasing interest as people move around the world, or visit places closer to home."[76]

These findings demonstrate that there is today strong consumer demand for sustainable tourism. In addition, there are confluences of trends identified by CREST,[77] that suggest that the demand for sustainable tourism is likely to remain strong into the future. These trends include:

a) **Generational shifts** - The **"Baby Boom" generation** (those born between 1946 – 1964) are entering retirement and are finding themselves with more leisure time. There are, for example, almost 80 million Baby Boomers in the United States. They control 70-80% of the wealth, live longer, value more active lifestyles including long-haul travel, and are increasingly aware of environmental issues. In addition, the **"Gen-Xers"** (the generation born between 1961 – 1981) are environmentally conscious and have embraced conscientious consumerism or "spending your way to a greener planet." The **"Gen-Yers"** or "Millennials" (children of Baby Boomers born from the early 1980s to 2001) are generally extremely well informed, electronically savvy, like personal attention, and are passionate about environmental and social justice issues. Each generation influences the others and together they are driving demand for responsible tourism.

b) **Urbanization** – By 2010, half of the world population was living in cities, for the first time in human history. This is also leading to greater stresses: urban densities, increased traffic, air and noise pollution, and loss of green space. Urban workers spend increasing amounts of time in artificial environments -- air-conditioned office buildings, personal cars, high-rise apartments, and in front of computer screens or on cell phones, and this adds greatly to the stress of city-dwelling. They seek to re-connect with nature (trend "c" below).

c) **Need to connect with nature** - In response to trend "b", urban workers are seeking to spend their leisure time in areas where they can 'reconnect with nature'. Hiking, camping, wildlife viewing, snorkeling and SCUBA holidays (all trending upward) offer a chance to escape from urban environments and busy work lives. Some urbanites, particularly younger ones, turn to active outdoor adventure travel such as whitewater rafting, mountain biking, climbing, and skiing/snowboarding to both meet the need to reconnect with nature while maintaining their fast-paced lifestyle.

d) **Emergence of experiential tourism** - In 2001, the UNWTO identified "experiential" tourism (which encompasses ecotourism, nature, heritage, cultural, soft adventure tourism, rural and community tourism) as among the sectors expected to grow most quickly during the coming two decades.[78] Experiential tourism is the opposite of mass tourism that traditionally focused on package tours and vacations with low levels of

[76] UNWTO, *Communicating Heritage: A Handbook for the Tourism Sector*, 2011, p. 19
[77] CREST, "Market for Responsible Tourism Products," pp. 25-27.
[78] UNWTO, "Global Forecasts and Profits of Market Segments," *Tourism 2020 Vision*, vol. 7, Madrid: UNWTO, 2001.

personal involvement. Experiential tourism *shows* rather than *describes.* It encourages visitors to actively participate in the experience and promotes activities that draw people outdoors, and into cultures and communities. In this sense it is very personal and individual. Essentially, experiential tourists seek memorable experiences.[79]

e) **Demand for authenticity** - Modern consumers want authentic experiences.[80] According to the UNWTO, "The postmodern consumer's search for experiences that are engaging, personable, memorable – and above all authentic is especially strong in respect of tourism."[81] Contrived experiences created by tourism operators, theme parks, cruise lines, resorts, and so on that are based largely around consumption – eating, drinking, shopping, gambling, etc – and manufactured or mass produced entertainment are no longer favored by a growing number of travelers. Rather, consumers want to see the real thing and are savvy enough to easily tell the difference when something is not authentic.[82]

e) **Conscientious consumers** - Consumer demand is on the rise for products that are seen as "organic", "sustainable", "environmentally friendly", "green", "fair trade", or any other of several buzz words that imply care for the environment and for the workers. A non-profit research group called Lifestyles Of Health And Sustainability ("LOHAS") found that in the United States, consumers who are focused on health and fitness, the environment, personal development, sustainable living and social justice (known as conscientious consumers) number 41 million people, or 19% of U.S. adults.[83]

f) **Togetherness** – Families are taking three-generation journeys, with grandparents, parents, and children taking holidays together. They want to enjoy and spend time with one another, but also to have the opportunity to each do different things. They seek+ holidays offering a range of vacations."[84]

f) **Search for fulfillment** - A final trend, the search for personal growth and fulfillment, is combining with the others trends listed here to drive demand for responsible tourism products. As Baby Boomers, Gen-Xers, and Millenniums or Gen-Yers seek authentic, 'green' experiences as an escape from the stress of urban life, they are also increasingly searching for deeper meaning in their vacation experiences. This has led to a tremendous growth in both "volunteer" tourism ("voluntourism")[85] and travelers' philanthropy[86] programs, where travelers donate time, money, or goods to support worthy projects in the host destination. Opportunities for personal growth and

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[79] William L. Smith, "Experiential Tourism around the World and at Home: Definitions and Standards," prepared for the *International Journal of Services and Standards*, Emporia State University, Emporia, Kansas, p. 5.

[80] World Travel Market, "Global Trends Report*,"* 2008, p. 12.

[81] UNWTO, *Handbook*, 2011, p. 12.

[82] CREST, The Market for Responsible Tourism Products: With Special Focus on Latin America and Nepal, 2009, p. 26

[83] Green Exchange, "Green Exchange Commentary: LOHAS Defined," http://www.greenexchange.com/Read/Green+Exchange+Commentary+-+LOHAS+defined.

[84] CREST, The Market for Responsible Tourism Products: With Special Focus on Latin America and Nepal, 2009, p. 25.

[85] About.com Adventure Travel, "VolunTourism - Top Sources for Finding Volunteer Travel and Vacations," http://adventuretravel.about.com/od/volunteertravel/a/TopVolSources.htm.

[86] CREST has a multi-dimensional Travelers' Philanthropy program that promotes companies and travelers giving back to projects in tourism destinations. See www.travelersphilanthropy.org.

fulfillment are a value-added component of leisure holidays, and responsible tourism is growing as providers recognize this growing demand.

Different Types of "New" Tourism

These trends have led to the growth of new market segments, and the decline of others. The following growth segments in the travel markets seem most appropriate for Agrigento:

- **Culinary Tourism: Food and Wine Travel**

"Culinary Tourism has reached the tipping point as a niche and an industry. Unique food and drink are the perfect attractions, especially for second and tertiary destinations that now must market more proactively in the globally competitive market," says Erik Wolf, President and CEO of the International Culinary Tourism Association. Wolf goes on to say that culinary tourism is "the perfect tool for economic and community development because visitors fly, buy and try new food and drink and look for it when they return home, helping boost value-added food and drink exports. Every community should be looking for ways to promote its unique food and drink experiences."[87]

In 2007, the International Culinary Tourism Association, together with *Gourmet* magazine and the U.S. Travel Association (TIA) conducted the first-of-its-kind national survey of culinary travel. It found that "27 million travelers, or 17% of American leisure travelers, engaged in culinary or wine-related activities while traveling within the past three years."[88] In a finding that is particularly relevant to Agrigento, the survey found that "these serious culinary travelers are significantly different from other types of travelers, which has implications for any travel providers' strategy and marketing. Serious culinary travelers are more likely to shop, visit state and national parks and museums, specifically choose a destination to experience local culture and cuisine, and read epicurean magazines."[89]

Agrigento, with its fine cuisine, wines, olive oil and other products, has tremendous potential to capitalize the growing culinary tourism market. Italy is the birth place of the Slow Food Movement, and today there are 287 local chapters, including one in Agrigento. We were jokingly told by the professors we interviewed that "all restaurants in Agrigento serve slow food." Local residents may know this, but travelers do not. Take, for instance, this comment on Trip Advisor:

> "We were lucky to be recommended Locanda di Terra in Agrigento, while staying here 2 days. We were the only 2 customers and really could not understand why! This restaurant honors the typical, artisanal products still produced in Sicily and excels in

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[87] U.S. Travel Association, Comprehensive Culinary Travel Survey Provides Insights on Food and Wine Travelers, 2007, http://www.ustravel.org/news/press-releases/comprehensive-culinary-travel-survey-provides-insights-food-and-wine-travelers

[88] U.S. Travel Association, "Comprehensive Culinary Travel Survey Provides Insights on Food and Wine Travelers," 2007, http://www.ustravel.org/news/press-releases/comprehensive-culinary-travel-survey-provides-insights-food-and-wine-travelers

[89] U.S. Travel Association, Comprehensive Culinary Travel Survey Provides Insights on Food and Wine Travelers, 2007, http://www.ustravel.org/news/press-releases/comprehensive-culinary-travel-survey-provides-insights-food-and-wine-travelers.

slow food. We had a wonderful meal and enjoyed the sincerity of the owner and his staff. An experience not to be missed for the food lover when visiting Agrigento, and very reasonable priced, considering the standard!"[90]

o **Adventure Travel**

Outdoor tourism, primarily adventure which involves some degree of risk taking, comprises at least one-fifth of the global tourism industry.[91] In Europe, the adventure travel segment is even larger, accounting for 25% of total package sales or about 443,000 adventure tourism holidays per year.[92] A survey by the Adventure Tourism Travel Association (ATTA) in 2006 found that "adventure travel is the fastest growing segment of the tourism industry," and 69% of respondents said they "planned on taking an adventure holiday."[93] In 2011, 89% of those surveyed by ATTA said that adventure travel was of "increasing importance," up from just 42% of those surveyed in 2007.[94]

In addition, due to higher than average income and interest in sustainable and responsible travel, adventure travelers are generally willing to pay an average of 10% more to ensure their travel provider operates according to sustainable standards, according to a 2006 survey of U.S. travelers.[95]

o **Cultural and Heritage Travel**

According to a 2011 UNWTO report, "Research has shown that interest in the environment, culture and heritage is a primary motivation for a large number of travelers, and is consistently growing as a market sector."[96] This is definitely true in Italy where, according to the recent OECD study, "art cities have been growing very rapidly over the last ten years. They now represent about 22% of the domestic market and are the main attraction for the international market (38% of inbound visitors)."[97]

At the same time, studies show that good interpretation, including guides who have the knowledge, language, and communications skills to engage visitors, is vital in heritage and cultural tourism. According to the UNWTO, "The aim of good heritage communication is to

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[90] "Slow Food Restaurant Excellent!" Trip Advisor, June 18, 2010, http://www.tripadvisor.com/ShowUserReviews-g194662-d1554593-r67881480-Terra-Agrigento_Province_of_Agrigento_Sicily.html.

[91] CBI, "The EU Market for Adventure Travel," and Hotel News Resource, "Benchmark 2006 Adventure Travel Practices and Trends Report," March, 2007, http://www.hotelnewsresource.com/article26792.html.

[92] CBI, "The EU Market for Adventure Travel." In CREST, The Market for Responsible Tourism Products: With Special Focus on Latin America and Nepal, 2009, p. 96

[93] CBI, "The EU Market for Adventure Travel," and Hotel News Resource, "Benchmark 2006 Adventure Travel Practices and Trends Report," March, 2007, http://www.hotelnewsresource.com/article26792.html.

[94] ATTA, Adventure Tourism Development Index: 2010 Report, 2011, p. 4

[95] P. Schneider and C. Heyniger, 2006 Adventure Travel Industry Research Round-U, Xola Consulting, Santa Fe, NM 2006, cited in CREST, *The Market for Responsible Tourism Products: With Special Focus on Latin America and Nepal*, 2009, p. 99.

[96] UNWTO, Communicating Heritage: A Handbook for the Tourism Sector, 2011, p. 1

[97] OECD, Studies on Tourism: Italy: Review of Issues and Policies, 2011, p. 37

ensure that the initial tourism experience of a place generates sufficient interest that the tourist will return and seek even deeper experiences."[98]

o **Beach Resort Tourism**

While these market segments described above have all been growing rapidly over the last decade, there has been a simultaneous shift away from beach tourism. The UNWTO, in its analysis of tourism market trends from 2000 through 2020, stated that sun-and-sand resort tourism has "matured as a market" and its growth is projected to "remain flat." [99] According to a study of Mediterranean coastal areas "the massive tourist development of the last decades produced, on the one hand, an indiscriminate exploitation of the natural resources" while on the other, rapid building and "growing urbanizations with little planning" leading to "degradation and pollution."[100]

In Italy, seaside resorts continue to be the main tourism attraction for the domestic market, but for the international market, the culture and heritage of Italian cities is the main draw. "The progressive shift of tourism demand from beach tourism to art cities," the OECD study states, "supports a rethinking of traditional tourism business models."[101] The report goes on to argue that Italy, while less affected "by the erosion of the seaside mass tourism development model" must, like other countries, must seek "a greater diversification of the tourist offer (e.g. Rimini model)." [102] Rimini has transformed itself from a mass tourism destination into "a new model of sustainable tourist development that is able to harmonize a social economic development with the environment…to fully satisfy the tourist." In one of its biggest investments ever in sustainable tourism, the European Commission financed some 50% of the cost of Rimini's redevelopment.[103] As Agrigento looks to improving its beach front tourism, Rimini offers a positive alternative to the outmoded all-inclusive resort model geared to the mass market tourism.

o **Cruise vs. Yachting Tourism**

Cruise tourism is one of the most popular, fastest-growing and most profitable segments of the tourism industry. Since 1970, for instance, the number of people taking cruises globally has jumped over 24-fold, to about 12 million per year – and the number is projected to double again

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[98] UNWTO, Handbook on Tourism Product Development, 2011, p. 25.

[99] UNWTO, "Global Forecasts and Profits of Market Segments," *Tourism 2020 Vision*, vol. 7, Madrid: UNWTO, 2001.

[100] "Life Project Information Report: Strategies and Tools for a Sustainable Tourism in Mediterranean coastal areas," p. 2, http://www.minambiente.it/export/sites/default/archivio/allegati/life/LIFE_Ambiente/Layman_report_Medcoast.pdf.

[101] OECD, Studies on Tourism: Italy: Review of Issues and Policies, 2011, p. 14.

[102] OECD, Studies on Tourism: Italy: Review of Issues and Policies, 2011, p. 37

[103] "Life Project Information Report."Other useful articles on Rimini include: "Sustainable Urban Tourism: Involving Local Agents and Partnerships for New Forms of Governance," http://sut.itas.fzk.de/papers/pack1/SUT_Deliverable1_FrameworkApproach.pdf and "The Vision for the Strategic Plan: Rimini, Land of Meetings," http://www.riminiventure.it/binary/rimini_venture_new/documenti/FILE_DEFINITIVO_EN.1263300182.pdf.

by 2020.[104] At present there are over 30,000 cruises each year to some 2,000 coastal destinations; about 15% of cruise ships are deployed in the Mediterranean.[105]

In recent years, there has been growing concern about the negative impacts of cruise tourism. These include a range of environmental problems such as illegal dumping at sea of sewage and waste water, oily discharge, invasive species in ballast water, and damage or destruction of marine environments, including coral reefs. In terms of social or cultural impacts, the large visitor volumes of cruise passengers – up to 5000 at a time – discharged from a ship can be overwhelming to small and medium-sized coastal towns, which constitute the vast majority of cruise destinations. For instance, the U.S. city of Charlestown, South Carolina, which is a leader in tourism management and historic preservation, is currently trying to limit cruise tourism because of its negative impact on the quality of life for residents and visitor experience for stayover tourists.[106]

In addition, the economic benefits of cruise tourism to the ports-of-call is small, especially when compared with earnings from stayover tourists. The economic model of cruise ships is similar to that of all-inclusive resorts: to retain as much as possible of tourism spending within the business. Therefore cruise ships, while promoting the attractions of onshore visits, strive to keep as much spending as possible onboard. And, typically, 50% of money spent by passengers for onshore tours and shop purchases goes back to the cruise company.

CREST field studies in Central America found that the difference in earnings between overnight and cruise tourism is significant, with overnight visitors spending more per day, more in taxes, and, of course, staying far longer than cruise passengers. In Costa Rica, Honduras, and Belize, CREST determined that each stayover tourist spends between six and fifteen times more than the typical cruise passenger. A Caribbean Tourism Organization (CTO) study of 18 island nations found similar differences, with overnight tourists generating seven times more than the same number of cruise passengers. The CTO found further that the tax income per capita for the governments of the Caribbean showed a similar pattern. In broad terms, government income from each cruise passenger was $17 ($9 in head tax plus about $8 in sales tax), while the government collected on average $133 in taxes per overnight tourist – or eight times more for overnight visitors. [107]

Given this, we recommend that Agrigento should not seek to dredge Porto Empedocle with the aim of attracting large cruise ships. (However, dredging and other improvements could certainly be done to improve access for cargo ships.) A more viable tourism option for Agrigento is to encourage small-scale "pocket cruises" (under 250 passengers) and private yachts to dock in

[104] Martha Honey, Erick Vargas, William H. Durham, "Impact of Tourism Related Development on the Pacific Coast of Costa Rica: Summary Report," CREST, April 2010, p. 14.

[105] Martha Honey and David Krantz, *Global Trends in Coastal Tourism*, CREST, 2007, http://www.responsibletravel.org/resources/documents/reports/Global_Trends_in_Coastal_Tourism_by_CESD_Jan_08_LR.pdf.

[106] Preservation Society of Charleston, "Cruise Ship Tourism Special Report," *Preservation Progress*, Vol. 55, no. 2, August 2011, http://www.preservationsociety.org/cruisecontrol/PROGRESS-CRUISE%20reduced%20file%20size.pdf.

[107] Honey and Krantz, *Global Trends in Coastal Tourism*; CREST and INCAE, *Cruise Tourism Impacts in Costa Rica and Honduras: Policy Recommendations for Decisionmakers*, January 2007, http://www.responsibletravel.org/projects/documents/Cruise_Tourism_Impacts_in_Costa_Rica_Honduras.pdf; CREST, *Cruise Tourism in Belize: Perceptions of Economic, Social, and Environmental Impacts*, November 2006, http://www.responsibletravel.org/projects/documents/Master_Belize_report_Dec_4_FINAL.pdf.

either a renovated Port Empedocle or perhaps more appropriately to San Leandro. CREST's research has found that small-scale cruise tourism is "higher value" than large "high volume" cruise ships: it produces greater economic benefits than large cruises, with a better geographic distribution, and higher participation of small and medium enterprises.

Similarly, a report comparing small and big ship cruising found, "In general, big-ship cruises focus more on the journey, and small-ships cruises focus more on the destinations they visit by creating an environment that encourages guests to make purchases - such as crafts, food, and beverages - that benefit local communities." The report states further, "Most small ships have a smaller environmental footprint than big ships. They also generally offer the potential for a more positive social-economic impact on the people and destinations visited."[108] Private yachts also bring higher benefits. According to a study on the impacts of yachting in the Mediterranean, "Leisure ports have an important direct effect on the town due to both the quantity of purchases made and the value added generated, particularly where wages are concerned."[109] Most beneficial is if a coastal town such as San Leandro were to become a home port for pocket cruises and/or yachts since this means that owners and passengers will arrive and depart from this town and the boats would be outfitted, serviced, and repaired there.

In summary, Agrigento has many of the assets to appeal to international tourists interested in these newer market segments discussed above. As the OECD study on Italy states, "[R]esearch indicates that culture and art, gastronomy and wine, and sightseeing and nature were the most appreciated elements of the Italian brand present in the mindset of potential visitors to Italy (with each rating just over eight, on a scale of zero to nine, where zero is the lowest score)."[110] However, in developing its tourism sector, Agrigento needs to pay particular attention to the growing interest in sustainability. As the UNWTO states, "The buildup of consumers' socio-environmental awareness of tourism development is leading to increased scrutiny on the part of the public in destination decision making and a growing requirement for new tourism developments to be sustainable."[111]

Certification: Setting Standards for Sustainability

Parallel with the increasing demand in more experiential and sustainable types of tourism has been the growth of certification programs to measure the social, environmental and economic impacts of tourism. The idea of these voluntary certification programs is to award eco-labels to companies that meet specific criteria. These sustainable tourism certification programs complement much older tourism certification programs like the five-star rating system which measures quality, service and price of hotels and restaurants.

In explaining the rationale for certification, the Global Sustainable Tourism Council (GSTC) states, "Sustainable tourism is on the rise: consumer demand is growing, travel industry suppliers are developing new green programs, and governments are creating new policies to

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[108] Green.travel, "Small- and Big-Ship Cruising," tp://green.travel/small-and-big-ship-cruising.
[109] J. Ismael Fernández Guerrero, et al., "Economic Impact of Western Mediterranean Leisure Ports," http://www.encora.corila.it/Events/Conference/session4/puertas_paper.pdf.
[110] OECD, Studies on Tourism: Italy: Review of Issues and Policies, 2011, p. 117
[111] UNWTO, Handbook on Tourism Product Development, 2011, p. 11.

encourage sustainable practices in tourism. But what does "sustainable tourism" really mean? How can it be measured and credibly demonstrated, in order to build consumer confidence, promote efficiency, and fight false claims?"[112] Certification sets standards and helps distinguish genuine sustainable tourism businesses from others that make empty claims. There are a number of other reasons why certification is important. They include:

- **Benefits for certified businesses**
    - Certification helps businesses to improve. Going through a certification process teaches businesses the elements of sustainability and focuses attention on the needed changes. A better-operating business tends to be more efficient and to attract more clients.
    - Certification tends to reduce costs, particularly for water, electricity, and fossil fuels, without reducing the quality of service.
    - The certification process is often accompanied by easier access to technical assistance and lower cost financing for tourism businesses to use new technologies.
    - Certification can provide a marketing advantage to certified businesses.

- **Benefits for consumers**
    - Certification helps consumers to know which businesses are truly socially and environmentally responsible and to make choices on this basis. • Certification in general increases public awareness of responsible business practices.
    - Certification can alert tourists to the environmental and social issues in an area, allowing them to act more respectfully or contribute to solutions.
    - Certified businesses tend to offer better quality service.

- **Benefits for governments**
    - Certification helps governments protect the credibility of the destination from false claims or "green washing."
    - Certification raises industry standards in health, safety, environment, and social stability.
    - It lowers the regulatory costs of environmental protection.
    - By requiring economic benefits to communities, certification can help reduce poverty.

Over the last two decades, sustainable tourism certification programs have developed rapidly. Today there are an estimated 130 eco-labels and sustainable tourism certification programs, most in Europe and many designed to certify accommodations. While many of the early programs only measured environmental impacts, there has been increasing realization that the triple bottom line – environmental, social, and economic impacts – must be measured. Many of these programs are also designed to work in parallel with quality star ratings and government health and safety regulations. The newer programs often incorporate quality, administrative, health, and safety criteria alongside the sustainability criteria.

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[112] Global Sustainable Tourism Council, http://new.gstcouncil.org/

In Italy, there are a range of eco-labels and sustainable certification programs for various parts of the tourism industry. Some of the best known are in Figure 6.

Figure 6:   **Sustainable Tourism Certification Programs in Italy**

Blue Flag was started in Europe in the 1980s to certify beaches and marinas for water quality, pollution, safety and other areas. It has certified 3650 beaches and marinas in 46 countries around the world. In Italy there are 232 beaches and 63 marinas certified by Blue Flag, including 9 beaches but no marinas in Sicily. www.blueflag.org

Legambiente Turismo- "Eco-tourism label for Italy for any type of tourist accommodation business. Since 1997 Legambiente Turismo has worked to help tourist businesses to reduce tourist impacts in the destination and raise awareness in holiday makers, while enhancing quality and comfort and involving local businesses and tourists in more sustainable choices."
http://www.legambienteturismo.it/en/index.ph/

VISIT- (Voluntary Initiatives for Sustainability in Tourism) to develop a common platform for eco-labels and to demonstrate the potential of certification programs.
www.visit21.net;   www.visit21.net/VISIT_Associates_Application.html

EU Eco-label- Established in 1992 to encourage businesses to market products and services that are kinder to the environment. Italy has 157 "Eco-label licenses" under the category "Tourist Accommodation Services"
www.ec.europa.eu/environment/ecolabel/; www.ecolabel.org

Bio Holiday Farms Certification- The certification of environment-friendly touristic structures falls within a wider and more ambitious project aiming at restoring the Italian rural patrimony with a view to promoting sustainable tourism. In compliance with the ICEA standard of Eco-Bio Tourism.   www.eco-turismo.it/;
www.icea.info

Bio Hotels Certification- to "Die Bio-Hotels" Standard. "The BIO-Hotels primary outcome is to support and realize a different, sustainable and economic way of achieving their economical goals and work."
http://www.biohotels.info/en/

100% Energia Verde- "The certification in Italy is issued for energy produced from wind, PV, solar thermal, geothermal, sustainable hydro, tidal & waves, biogas and sustainable biomass & bio-fuel plants."
http://www.centopercentoverde.org/index.php

ANAB- (Architecttura Naturale) "A certification scheme that assesses the sustainability of building products and furniture." http://www.anab.it/certificazione/index.php

Earth Check- "Earth Check is the leading benchmarking, certification and environmental management program used by the travel and tourism industry." http://www.earthcheck.org/

The Green Key- "The Green Key is a diploma awarded to companies within tourism. Green Key is presently the largest global eco-label for accommodation and has a national administration centre in each

As new certification programs have developed there has been an ongoing global initiative, spearheaded by UN agencies and a group of NGOs including CREST, to harmonize the programs by incorporating a common set of baseline criteria. It is recognized that just as the five-star quality program is worldwide, with the different levels (1 to 5 stars) meaning approximately the same in all countries, similar compatibility among the sustainable tourism programs is necessary for them to have global significance. A major step forward was achieved in 2010 with the creation of the Global Sustainable Tourism Council, which is supported by the UN Foundation and supported by other UN agencies, leading travel companies, hotels, tour operators, international development agencies, NGOs, and country tourism boards. The GSTC fosters socially and environmentally responsible travel through the adoption of universal sustainable tourism principles. The centerpiece of this work is the Global Sustainable Tourism Criteria, a set of that any tourism business or destination should aspire to reach. (See Annex 6 for the list of criteria). More than 170 US cities have adopted the Criteria – and we propose that Agrigento should incorporate this goal as part of its sustainability.

Action Plan for the Agrigento Tourism Destination

Mr. Salvatore Moncada, as President of the Fondazione AGireinsieme, has tasked CREST with "provoking a shock" that will "wake up" decision makers, "stimulate action" in Agrigento, and have "strong appeal" abroad. The goal of this shock treatment, we were told, is two-fold: the reduction of poverty and the "discovery of memory," particularly among Agrigento's youth. On the one hand, this means creating good jobs and providing high quality work force training. On the other, it means creating a connection – not just physical or geographic, but an intellectual and cultural connection -- between the town and the Valley. As Mr. Moncada told us, "People in city don't feel connected to the archeological site. Ninety percent of young people don't go to the Valley. And the archeologists have thought and acted as if park was their personal private property. We have to build a connection; we have to build love in our young people for the park."

The Foundation and other leaders in Agrigento have correctly identified tourism as the engine that, if properly tuned up, refurbished, and put on the right track, can power an economic growth and cultural revitalization in Agrigento. In this report we argue that simply pursuing the current model of tourism, based on short term visits to the Temples, will not bring significant economic benefits to Agrigento. Nor will a model that is based on large scale, all-inclusive resorts, cruise ships, conventions centers, and an international airport. It may bring more visitors, but most of the tourism revenue will not stay in Agrigento, or even in Sicily.

Rather, a new model is needed, one that emphasizes quality, not quantity. Fundamentally, the goal is to *create a type of tourism industry in Agrigento that benefits local people, protects the environment, and enhances the cultural heritage.* We have outlined in this report the main ingredients of this new type of tourism. Briefly summarized it is based on:

- **Attracting high value, not high volume, tourism**. This is tourism that caters to an international clientele who is interested in experiential travel – in learning as well as enjoying while on a journey – and is concerned about reducing the environmental, social, and economic impacts of tourism.
- **Using the human, cultural, and natural resources of Agrigento**, rather than seeking major foreign investment and multinational corporations. Our site visit and study of the strategic plans and other documents has proved to us that Agrigento has a wealth of capable people and an outstanding range of tourism attractions to build a tourism destination that attracts discerning international travelers.
- **Expanding the average length of stay from 1.6 to 3 or 4 days**, as well as the average amount spent per day, based on the model of the flagship-hub-spokes. This will be possible by offering a wide range of well planned day excursions and activities for which tourists will stay longer and pay more than is currently the case with most visitors the Valley of the Temples.
- **Strengthening the hub in the *Centro Storico*** through upgrades including boutique hotels and more B&Bs, restaurants featuring local cuisine, wine bars, theatre and clubs with local entertainers and productions, and shops with well-crafted artisan pieces as well as works of art. One specific recommendation is to exhibit the wonderful hand painted oxcarts and the multi-media exhibit with video and photos at either the at

Foundation's new headquarters or in the new museum the Foundation proposes to build in the *Centro Storico*.

- **Improving the *Centro* Storico as well with public investment** in ensuring adequate electricity, water, WIFI, bike and pedestrian pathways, police, and other services needed by both the local population and tourists.

- **Ensuring environmental, social, and economic sustainability** so that Agrigento earns the mantle as a "green city." Sustainability should become an integral part of tourism and other development in Agrigento. It should be, we argue, "baked into the DNA" of the destination so that all plans, projects, and operations strive to meet well recognized standards and best practices for sustainability. Not only will a "green" Agrigento help attract high value tourists, it will also help to protect and enhance Agrigento's social, cultural, and natural resources.

We therefore have **the challenge** – to create a shock – and **the goal** – to reduce poverty and increase cultural pride -- as well as **the vision** for the type of tourism needed to achieve this goal. Next is to determine what are the **action steps** needed to put Agrigento's tourism on the right track. We have identified three broad actions, drawn from the ideas and analysis in the preceding chapters:

1. Establishing a Destination Management Organization (DMO) for Agrigento

As more people decide to travel, the more the challenges will emerge at the destination level in terms of preserving the local natural and cultural resources, the permanent resident's quality of life, and the tourists' quality of visit. Destination management is the trend of the future, especially for mature destinations like Agrigento. To ensure the sustainable development of the destination as a whole, governance will be of crucial importance to gain and remain competitive. A DMO that brings together the public and private sectors to effectively perform -- like an Italian soccer team (!)-- in the planning and the management of the destination, will have a better chance in achieving success.

- Fundamental obstacles are a lack political will to collaborate, limited financial resources, lack of understanding the complexities of a tourism system, and the challenges of competing in a global market
- A role of the DMO will be influencing tourism policy and planning, and managing the external and internal competitive environments, the brand, and positioning of the destination
- Early projects that the DMO could undertake or coordinate:
    - **Website development** highlighting cultural tourism, perhaps funded by the Foundation; good models: privatesicily.com; cultural tourism dc; Washington.org
    - **Tourist surveys and focus groups** – analysis of FIT market vs. package tours
    - **Attractions Inventory** of the Agrigento destination – assets assessment with input from a range of stakeholders
- Further analysis of the area's tourism resources is warranted to achieve a critical understanding of how best to manage them within a tourism policy and framework that

"will create an environment that provides maximum benefit to the stakeholders of the destination, while minimizing the effects, costs and negative impacts of visitation, thus ensuring that the destinations' environmental, social and cultural integrity is not compromised."[113]

2. Role of the Foundation

A) Create a new Institute for Competitiveness and Sustainability

It is widely recognized that competitiveness and sustainability must go together. We believe that the Foundation can play an important role as an incubator of new projects, standards, and businesses related to improving Agrigento's international competitiveness and its sustainable practices. This Institute will have an administrative staff and employees for reach of the four broad programs we envision that could be housed within it.

- **Workforce Development:** it is clear that the development of a well qualified tourism workforce focused on youth employment is considered vital for improving the local tourism industry's sustainability and competitiveness and reducing poverty in the province. The first step is to undertake a comprehensive study based on surveys and focus groups of Agrigento's current workforce and its needs. With the goal of creating new jobs for youth, the study will survey four groups:

    1) Young people (both students and out-of-school students) regarding their perceptions and attitudes towards the tourism industry and tourism jobs.

    2) Owners of tourism businesses (hotels, tour operators and guides, car rentals and other transport, restaurants, etc.) to determine what skills are needed and where there is an over supply.

    3) Tourism workers to understand their attitudes towards work in the tourism sector, including pay, seasonality, working conditions, training, job advancement, etc.

    4) Educational and training providers and instructors (vocational and university) to assess whether the curriculum and courses are meeting the needs of the tourism industry and how successful graduates are in attaining gainful employment. Establish a job placement center after we have a full understanding of the gaps and we have developed a strategy to address these gaps.

This study will provide an important baseline of the current workforce and information about needed modifications in courses and training and possibilities for new businesses.

- **Micro Enterprises and Skills Training for Youth**
    Based on the workforce study, the Foundation could help young people to start a number of small and micro-enterprises. Possibilities that we have identified include (and others will certainly become apparent):

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[113] Ritchie and Crouch, 2003.

- o **Guide training and tour development** for nature, adventure, culinary, wine, literary, and other types of specialty tours. One or more of the Agrigento guides already offering this type of tours could teach this. It would both train guides and works to develop new tours or improve existing ones.
- o **Language training:** Tutoring in English and other languages from the four main outbound generating markets for Sicily (French, German and Spanish), with a focus on interactions with tourists.
- o **"Green" transportation** for visitors and tourism workers, including electric bikes and Segway vehicles.[114] We believe that guided Segway tours could be organized, for instance, within the Valley of the Temples and the *Centro Storico*.
- o **New consumer technologies** and resources for the Agrigento destination
  - This could include aps for telephones and mobile devices, short promotional videos, websites
  - Systematically contacting all guide book writers/publishers and websites with content about Agrigento's new tourism initiatives and commitment to high value sustainable tourism
- o **Gastronomy training school and demonstration "Slow Food" restaurant**
  We see a range of possibilities for creating jobs and new attractive venues and products for the tourist market. Briefly, these could include:
  - Packaging existing products for sale to visitors (marmalades, condiments, wines, cheeses, olive oil, etc.) A small business could be started to systematically collect homemade products.
  - Create a culinary institute for young people specializing in traditional foods
    - Identify elders with authentic recipes who can help teach
    - Open a model state of the art kitchen and restaurant featuring both new chef students and old chefs/cooks
    - Offer meals for both for tourists and the community, with tourists paying more
  - Promote membership in the Agrigento chapter of the Slow Food Movement and develop a Slow Food website.
    - Spain has an excellent one: http?//slowfoodaraba.es
    - Target small and medium size restaurants to join the chapter and be
      promoted on the website

- **Ensuring Sustainability**
  We propose that the Foundation set up a team of experts and a program designed to convert Agrigento into a "green city", with the tourism leading the way. The aim should be that all projects – either to build new facilities or renovate existing ones – should conform to international best practices for sustainable design, construction, and operations. This team will undertake a number projects including:
  - o A baseline assessment of Agrigento and what is required to have it qualify as a "green city" or "green destination.".

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[114] There are a number of websites with information about using Segways for tourism. These include
www.segway.com, www.segway.it, and www.segway.com/business/tourism-promotions.php

- Assist the government in developing more environmentally friendly and low impact public services including electricity, water, waste management, public transportation, etc. Develop government incentives for businesses to adapt sustainability programs and green technologies.
- Creating certification and "best practices" programs for measuring the environmental, social and economic sustainability as well as quality and service standards of hotels, B&Bs, tour operators, guides, transport, beaches, airports, etc. Deciding which certification programs are most suitable for the Agrigento destination, with a view to selecting ones that comply with the international sustainable tourism criteria and standards of the Global Sustainable Tourism Council and quality/service programs such as the 5 star program.
- Offer workshops, training and courses on "greening" the city and sustainable tourism certification programs.
- Compile a database of potential funding sources for socially and environmentally responsible tourism projects.
- Establish a program to train auditors who will assess businesses and government agencies that are seeking to be certified under particular programs.
- Help the Micro Enterprise team to identify potentials for new 'green' businesses which can be assisted by the Foundation's micro-enterprise and training program.

- **Promoting Archeological research and employment**
  Create a team of experts that will work with the Archeological Park, Museums, guide associations, and Agrigento University (based on a Memorandum of Understanding) to identify new employment opportunities for archeologist graduates. These could include:

  - International exchange programs with UK and US universities offering archaeology and Greek and Roman Studies, as well as Italian studies. See following link for all US Universities offering Graduate Degrees in Archaeology, Mediterranean Art and History etc.: http://www.archaeological.org/professionals/gradprograms
    - See a concrete example for undertaking research in Sicily (!!) being offered by AIA: http://www.archaeological.org/fieldwork/afob/7287
  - Establish a working program with the Archaeological Institute of America (AIA) (http://www.archaeology.org), that will include: International Conferences; offer year round traveling package to the AIA members to the Valley and all other Sicilian Greco-Roman places; establish a fellowship, grant and scholarship program; establish an Annual Gala Event (see AIA's high-end Gala)
  - Organize Archaeology Fairs, which are special events that feature archaeologically themed programs and interactive activities for the whole family. Activities are created and presented by archaeologists, educators, and other specialists. This is your chance to dig into archaeology and uncover the past.
  - Open new areas for visitation is an issue that needs further study, which we agree with. In our view, this action is an opportunity to encourage scientific

research, provide employment for the local students who are studying and graduating in the cultural heritage field and the opportunity to further expand the international academic and scientific exchange programs currently in place.
- o Institutionalization of the UNESCO's World Heritage Volunteer Program.

B) Brick and Mortar Projects

We applaud the Foundation's plans to undertake a number of concrete construction projects to help fill gaps in the tourism sector and enhance the quality of tourism within the Agrigento destination. We recommend that the Foundation seek to make these showcase or demonstration projects for sustainability as well. It is important that the Foundation not only "talk the talk" of sustainability; it must also "walk the walk." It is our understanding that the projects under consideration include:

- **Redevelopment of Villaggio Mose** (located close to the archaeological site and the ocean), including the establishment of a **2,000 bed hotel**. This hotel should definitely be built to LEED standards and to meet the criteria for one of the well know sustainable accommodation certification programs, such as Green Key,r Earth Check or Legambiente Turismo. [115] We would also recommend that the restaurant(s) for the hotel feature local food and wines and typical Sicilian food and be aligned with the Slow Food Movement in Sicily.[116]
- Construction of a **small airport** for interregional traffic. We applaud the decision to build an airport for domestic traffic, and not an international airport. We believe an airport both for private planes and small to medium commuter planes flying to Palermo, Trapani, and Catania is what Agrigento needs. We recommend that the airport be built to conform to the latest in "green" airport technologies and standards and that any airplanes or airlines connected with the Foundation adopt green standards.[117]
- Construction of an **art and cultural museum** and meeting place in the city center. A fine project, which we also recommend be built according to LEED standards.
- Dredging and enhancement of **Porto Empedocle** for cruises and leisure tourism. We strongly recommend that it be built for small cruise ships (under 250 passengers) known as "pocket cruises" and for private yachts because they are less invasive than large cruise vessels and generally bring in a higher value tourist. In addition, the marina should be built to meet the Blue Flag certification criteria for marinas[118] – and it will become the first such certified marina in Sicily.
- Improving services and physical features in the **San Leone beach** area. We recommend that the Foundation also work with the local community and businesses to meet criteria for getting the beach certified under the Blue Flag program for the beach and the

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[115] Green Key is the largest global eco-label for accommodations, but it has only 10 accommodations certified in Italy. http://www.green-key.org/. Earth Check is a leading benchmarking, certification and environmental management program http:www.earthcheck.org. Legambiente Turismo, the leading ecotourism label for Italy, http://www.legambienteturismo.it/en/index.ph/.

[116] The Slow Food Movement, which began in Italy, has 11 local chapters in Sicily. In Agrigento, it is led by Brucato Massimo, email: massimobrucato@alice.it. Website: www.slowfood.com.

[117] There are several green standards programs for airports and airlines, including Fly-360-Green, http://www.worldgac.org/fly360greenairlines.html and Clean Airport Partnership, http://cleanairports.com/index.htm. Zurich is one of the few green airports in Europe.

[118] Blue Flag is a well respected and large program that certifies both marinas and beaches around the world. www.blueflag.org.

marina. Currently nine beaches and no marines are Blue Flag certified in Sicily. None of the beaches are certified in the municipality of Agrigento. Source: www.blueflag.org. We believe it might make sense to use San Leone for the pocket cruises and private yachts and retain Porto Empedocle for cargo and commercial vessels since it is near the industrial zone and gasification facilities. It is best not to mix cargo and pleasure boats.

3. Expanding International Tourism by Targeting the US and other English speaking countries

In order to increase "high value" tourism, we propose coupling the above initiatives with a targeted public campaign to introduce Agrigento to the U.S. market. Here are some preliminary ideas of what this could involve:

- Bringing US outbound tour operators to Agrigento, showing them the products and tours, and aligning them with local tour guides, hotels, and other facilities and services.
- Promoting Agrigento through food specialty stores, wine shops, and restaurants that carry Agrigento provincial products (wines, olive oil, etc)
- Wok with travel journalists and developing ad campaigns to promote Agrigento in travel, food, wine, etc magazines and websites
- Promote special tourism to the Sicilian Diaspora in the U.S. through their clubs, civil associations, neighborhoods, etc.

These represent an overview of what we believe should be undertaken in the short, medium and long term. CREST would welcome an opportunity to provide more details and a timeline for those the Foundation is most interested in pursuing. In addition, CREST would welcome the opportunity to assist in implementing a number of these projects where we have particular expertise and knowledge.

Annex 1:   People Interviewed by CREST

We apologize for anyone whose name or title is misspelled or incomplete, or anyone we inadvertently failed to include on this list. This interviews were invaluable to our work and we appreciate the time and insights everyone gave us.

1. Ambrosini, G. Professional Institute for Hotel Services, Catering, Trade and Tourism
2. Cacciatore, Enzo. Tour Guide
3. Calì, Valentina. Teacher and Archaeologist
4. Camilleri, Vincenzo. Tourism Planner and Coordinator of PISU-PIST
5. Campoccia, Luigi. Moncada Energy
6. Casà, Girolama. Prof. ssa, Instituto Professionale per i Servizi Commercialie Turistici N. Gallo
7. Castiglione, Ilaria. Prof.ssa, Istituto Professionale per i Servizi Alberghieri, della Ristorazione, Commerciali e Turistici
8. Cozzo, Laura. Moncada Energy
9. D'Alessandro, Stefano. Owner of Villa Atena 5 Star Hotel
10. Falzone, Marco. Tour Guide
11. Farruggia, Emanuele. Event Management
12. Fattori, Pietro. President and part owner of Akrgas Express Train
13. Flora Prof., Foundation Board Member and Director of Pirandello Theatre and member of Chamber of Commerce
14. Fontana, Mimmo. President of Legambiente Sicilia
15. Gallo, Michele. Guide and part owner of Sicily TravelNet
16. Giglio, Piero. Owner of Hotel Dei Pini
17. Girolama, Casà. Prof.ssa, Istituto Professionales per I Servizi Commerciali e Turistici N. Gallo
18. Guagliardo, Tommaso
19. La Gaipa, Fabrizio. Owner of hotel Costa Azzura in San Leone and member of the tourism board for Agrigento and the hotel's association.
20. Lascala, Marcelo. Son of the maker of the famous Ox Carts: Raffael Lascala
21. Lo Pilato, Giuseppe. Director of Garden of Kolymbetra
22. Lopez, Morgan. Divemaster and owner of Crew Lopez
23. Mangionese, Elvira. Owner of Camera Sud B&B
24. Meli, Pietro. District Superintendant for Agrigento (Soprintendenza)
25. Mezzacorona, Feudo.
26. Micciche', Marilu'. Moncada Energy
27. Minacori-Pippo, Paolo. Foundation Board member, pharmacist, art gallery owner
28. Mirabile, Antonietta. Prof.ssa, Professional Institute for Services Trade and Tourism
29. Moncada, Salvatore. President Moncada Energy Group and the AGireinsieme Foundation

30. Montana, Alessandra. Moncada Energy
31. Moscato, Giovanni. Owner of Posta Vecchia Theatre and B&B
32. Parello, Giuseppe. Director of the Valley of the Temples Archaeological Park
33. Pendolino, Gaetano. President of Consorzio Turistico Valle dei Templi and Executive Director for Valley of the Temples Tourism Board for Agrigento.
34. Picarella, Francesco. President of hotel's association
35. Rigoli, Giuseppe. I.T.C. Statale Leonardo Sciascia
36. Russo, Giovanni. Prof., I.T.C. Statale Leonardo Sciascia
37. Salamone, Giuseppe. Prof., Istituto Professionale per i Servizi Alberghieri, della Ristorazione, Commerciali e Turistici
38. Sciacca, Giovanni. Owner of Antica Perla Hotel and President of Hotel Association
39. Sciarratta, Roberto. Commissioner of the Valley of the Temples Archaeological Park
40. Spoto, Pierfilippo. Val di Kam – Sant'Angelo Muxaro Village
41. Tedesco, Alessandro. Mountain Bike outfitter – Coast2Coast
42. Verbari, Costantino Cott
43. Zambuto, Marco. Mayor of Agrigento

Annex 2: Agrigento: Destination Review

1. Introduction

1.1 The following *Destination Review* of Agrigento, as a tourist destination, is the result of the information that was researched, collected and documented prior to the *in situ* site assessment that was undertaken by the CREST team from January 14th through January 19th, 2012, The purpose of the review was critical for understanding the context of the consultancy assignment, to gain a basic understanding of the destination based on a series of elements,[119] and for acquiring sufficient crosscutting knowledge to ensure that future recommendations for the development of sustainable tourism in the area of study are attainable.

1.2 The *ex-ante* review was undertaken during a two-day period and focused on existing secondary data, such as published peer-reviewed academic articles, tourism studies and statistical tourist information on both Sicily and Italy. The web research concentrated on a variety of web sites focusing on travel to Sicily and Agrigento.[120] The purpose was to investigate the on-line presence of Agrigento, as a tourist destination. Other significant web sites that were examined were: (i) the Sicilian regional tourism portal; (ii) UNESCO's World Heritage web site for the Valley of the Temples; and (iii) Facebook's World Heritage Sites in Sicily.

2. The Province of Agrigento, the Valley of the Temples, and the City of Agrigento

2.1 Using Google's search engine, Wikipedia[121] was the only source that provided a quick overview of the Province and its capital, in terms of its: (i) evolutionary historical name (*Akragas, Girgenti* and *Agrigentum*); (ii) layers of history; (iii) main economic sectors (agriculture, tourism and sulfur and potash, the latter two no longer being exploited for production and commercialization); (iii) the main tourist attraction - the Valley of the Temples - with a picture of the Temple of Concordia; (iv) notable residents (*Luigi Pirandello* and *Empedocles*); (v) international relations with other cities (Tampa, USA, Valenciennes, France and Perm, Russia); (vi) the Province's Coat of Arms; and (vii) *San Gerlando*, its Patron saint.

2.2 Also provided by this portal is the geographical location of the Province in Italy (see map below); the Province's total surface area (244 km^2); elevation above sea level (230 m); and its population (486,000 inhabitants for the entire Province and 59,136 inhabitants for the City of Agrigento - 2008 figures). Other basic information provided is the name of the current mayor (*il Sindaco*) of the City of Agrigento (Mr. Marco Zambuto), time

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[119] The physical attributes that relate to tourism attractions and activities (geography, climate and topography); socio-economic, political, and cultural context (history, sociological and anthropological information; economic and population profiles); current national, regional, state and local tourism policies and plans to understand the enabling environment and the government's approach towards tourism development in the area of intervention; and existing tourism market segments, current products being offered, existing marketing efforts, and overall international trends for tourism in similar geographic areas and the means/models deployed by respective governments and or destination management/marketing organizations to attract tourists.

[120] See Annex 3 for a list of documents and web sites that were ex-ante researched and downloaded.

[121] http://en.wikipedia.org/wiki/Agrigento.

zone, and postal and dialing codes. The Province's 43 municipalities (*Comuni)* are also listed, as well as the City of Agrigento's 9 principal sub-divisions (*Frazioni*).

2.3   In addition, the web site offers useful external links for acquiring travel information on the destination, such as: (i) the Valley of the Temples Agrigento Visitor's Guide; (ii) the Wikitravel Agrigento Travel Guide; (iii) Agrigento and the Valley of the Temples – Visitor's guide; and (iv) a photo gallery of the Valley of the Temples by photographer Yair Karelic.

2.4   The link to the official website for the *Comune di Agrigento*, including the section for tourists (*Servizi per il Turista*), was not helpful at all from an international tourist's consumer point of view, especially since it was not, by any means, English friendly. Although it provides a link for accommodations and emergency numbers and public transportation schedules and routes information, the other links are not functional and lack content. Within this section of the site, the logo and link to the *Consorzio Turistico Valle dei Templi* was embedded without any reference at all. This web site, still under construction and also not English friendly, is well structured and user-friendly. Recommendations to further enhance this web site can be found in the main body of the report.

2.5   The web sources investigated for obtaining tourist/travel information on the destination were several. However, the following five were the most useful: (i) Agrigento and the Valley of the Temples Travel Guide; (ii) Travel Plan.it; (iii) Trip Advisor; (iv) Think Sicily.com; (v) the Sicily Travel.net; and (vi) the official Sicilian Autonomous Region's tourism web site. Overall, they provide practical information to the traveling consumer for the pre-consumption phase[122] necessary for: (i) planning a trip to Sicily, the Province of Agrigento, the Valley of the Temples and to a certain degree, the city of Agrigento; (ii) to formulate or correct expectations of the destination; and (iii) to evaluate, compare

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[122] There are three stages of tourism consumption: Pre-consumption; Consumption; and Post-consumption. Each stage has a different set of communication and information needs for the traveling consumer (Gretzel, et al, 2006).

and select alternatives before executing any transaction with providers of tourism products and services.

2.6   Of the five web sites listed above, the Trip Advisor web site[123] provides a comprehensive consumer oriented platform for Agrigento's tourism offerings, ranging from accommodations, sights, rentals, and restaurants to maps, photos and videos. Most important, however, it provides feedback content from travelers who have visited and experienced Agrigento, as a result of undertaking on-site consumption and transactions of the tourism product and services in the area. This particular type of visitor satisfaction feedback is essential to monitor from a destination's tourism management and marketing point of view in order to assist the local tourism industry to understand current and anticipate future needs and wants of the traveling consumer.

2.7   The Think Sicily web site caters to the high-end consumer market by offering throughout Sicily, attractive villa rental properties and associated customized services. The Guide section is extremely informative and can be downloaded as an application to mobile devices, which is particularly helpful for the traveling consumer while *en route*.[124] The application is part of the new consumer technology trend whereby providers of tourism products and services are adding more on-line content and context to mobile devices to enable the consumer to have improved individualized information for travel planning and consumption.

2.8   The Sicily Travel.net web site is a valuable web site. It offers various thematic itineraries for the city of Agrigento, the Province and other Sicilian destinations. For example, the literary tour is focused on educating the tourist by visiting the Agrigentine literary heritage sites left behind by *Luigi Pirandello* (home, museum and places he wrote about), *Andrea Camilleri* (places where the fictional Inspector Montalbano carries out his detective work) and *Giuseppe Tomas di Lampedusa* (*Palazzo Filangeri de Cutò* in *Santa Margherita di Belice* – where the original manuscript to his major literary work of *Il Gattopardo* is preserved). In addition, the web site provides information on the Valley of the Temples and the *Centro Storico*, as well as other customized services such as airport transfers, lodging recommendations and private transportation. Links to accommodations in the Agrigento area are also provided. Lonely Planet, the Washington Post and Trip Advisor highly recommend this web site.[125]

2.9   The official Sicilian Autonomous Region's tourism web site (*Assessorato Regionale dei Turismo dello Sport e dello Spettacolo*),[126] also offers significant although disjointed information on the following attributes related to Agrigento. It is listed as one of the sixteen-featured Sicilian destinations under the category of Timeless Island. Within this category it provides a brief history, description and a photo gallery on the Valley of the Temples; a brief description of four major historical cites located in the *Centro Storico*; an Agrigento fact sheet and the link to the official website for the *Comune di Agrigento* (see para. 2.3 above for the criticism of the Municipality of Agrigento's official web site).

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[123] http://www.tripadvisor.com/Tourism-g194662-Agrigento_Province_of_Agrigento_Sicily-Vacations.html
[124] http://www.thinksicily.com/guide-to-sicily.aspx
[125] http://www.sicilytravel.net/index.html
[126] http://pti.regionale.sicilia.it

2.10   Under the category of Our Sea and Islands, the *Pelagia* islands of *Lampedusa* and *Linosa* are featured, as well as the beaches of *Capo Bianco* and *Eraclea Minoa, Licata, Realmonte* and *Scalia dei Turchi* and *Sciacca*. Within the category of Parks and Reserves, the 10 Regional Nature Reserves of the Province of Agrigento are listed and described. Moreover, it provides the name of the institutions and/or organizations that are responsible for the management of the protected areas, which is extremely useful. However, maps to locate them geographically in the Province of Agrigento are lacking. It should be noted that in the home page of *Parco Alcàntara*, there is an excellent interactive topographical map of the park, which should be replicated for all of Sicily's parks and reserves.[127]

2.11   In the category of Gastronomy, there are 7 Routes of Wine that are highlighted for the entire Sicilian region. In the case of the Province of Agrigento, the wine route is called the *Strada dei Vino Terre Sicane* with an indication that the oenological culture of the areas of *Santa Margherita di Belìce, Sambuca di Sicilia, Menfi* and *Contessa Entellina* are important for the Province's economy. However, information on the type of grapes used in the production of wine in this particular region or linkages to the wineries located in these municipalities, as well as a map of the route and for the remaining indicated routes is lacking.

2.12   Under the Cultural Events category, within the Religious subcategory, the first week in July celebration of Agrigento's *San Calogero* is mentioned. In the subcategory of Between Culture and Folklore, the following events are mentioned: (i) Sciacca's *Carnevale*, Agrigento's *Sagra dei Mandorlo in Fiore* (the Almond Blossom Festival) in February, the *Danza del Taratatà* in *Casteltermini* and the *Studi Pirallendiani* honoring the literary works of Luigi Pirandello, Agrigento's revered Nobel Prize author and writer in Literature. In the subcategory of Sports Events, there is no mention of any event in Agrigento. In the category of Spa and Relaxing Breaks, the thermal resources and spas to be found in Sciacca are briefly described.

2.13   There are other categories that are listed in the home page and that provide useful information. The Where to Stay category contains a comprehensive database of accommodations for all the Sicilian provinces, classified by: municipalities; typology (hotel, B&Bs, rentals, cottages, etc.); star quality rating; and amenities. The remaining categories of Travel and Transport (non-functional); Tourist Tips, Itineraries, Brochures, Weather Forecast and Bill of Tourist Rights are informative. The Itineraries category provides more information on two additional items that further position Agrigento within the web site: (i) the Literary Park, which highlights the geographical locations where Agrigento's literary figures lived and wrote; and (ii) Agrigento's Castles of *Racalmuto, Naro* and *Favara*.

2.14   The web site also provides a Bill or Charter of Tourist Rights, an official Sicilian government document that informs on the rights of tourists as consumers of Sicilian tourism products and services available in the Sicilian territory. It is divided into 13 chapters addressing a variety of important matters ranging from the rights and duties of the parties with regard to accommodation, transportation, resolution of controversies,

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[127] http://www.parcoalcantara.it/mappa.php

timeshare contracts, insurance policies, customs rules and currency regulations, to health care, tourist information, promotion and useful contacts and numbers.[128]

2.15   All the web sites that were examined emphasize the Valley of the Temples. This feature is understandable given the fact that the Greek monuments and archaeological park is a World Heritage Site. Both the UNESCO's World Heritage Centre and Facebook's World Heritage Sites in Sicily web sites were therefore investigated.

2.16   UNESCO's WHC web site[129] provides all the indispensable information on the Valley and its Temples in terms of its: (i) description; (ii) history; (iii) maps; (iv) technical documents and criteria used for justifying its inscription on the WH List; and (v) indicators for reporting its state of conservation, which for the last 10 years has not reported a problem or threat to the area. As a WHS since 1997, the property complies with the following criteria:

> Representing a masterpiece of human creative genius;
> Exhibiting an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology monumental arts or town-planning and landscape design;
> Bearing a unique or at least exceptional testimony to a cultural tradition or to a
> Civilization which is living or which has disappeared; and
> Being an outstanding example of a type of building or architectural or technological ensemble or landscape, which illustrates significant stages in human history.

2.17   It should be noted that Trip Advisor is a key partner of UNESCO's World Heritage Center. This is important because it can engage its 45 million monthly visitors to support the protection of the Valley of the Temples by having them vote and donate for its conservation and to "help conserve and support sustainable and responsible tourism."[130]

2.18   Facebook's World Heritage Sites in Sicily web site[131] is relatively new. It is not clear who is the web master managing the site. It provides useful information and a quick overview of the World Heritage Sites in Sicily with an impressive and diverse photo gallery. The site needs further enhancement to: (i) provoke more activity from visitors who have visited the sites; (ii) create a community for communication, interaction and transactions; and (iii) for further promoting the destinations where these sites are located. Agrigento could benefit immensely from this portal, given Facebook's global outreach and social networking platform.[132]

2.19   The academic article titled: "Recovery and Valorization of a Historical Fruit Orchard: the Kolymbetra in the Temple Valley, Sicily"[133] provides an excellent framework to understand a series of elements that characterize the unique natural landscape and setting of the Valley of the Temples and immediate surroundings. Furthermore, it is a

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[128] This document although downloaded was not analyzed in-depth for the purposes of the Destination Review.

[129] http://whc.unesco.org/en/list/831

[130] http://www.tripadvisor.com/WorldHeritage-LearnMore

[131] http://www.facebook.com/pages/Unesco-World-Heritage-Sites-in-Sicily/157445294312455?sk=wall&filter=12

[132] At the end of December 2011, Facebook had 845 million users (Facebook Newsroom).

[133] G. Barbera, M. Ala, D.S., La Mela Veca and T. La Mantia (2006). *Dipartimento di Colture Arboree, Università di Palermo, Palermo, Italia.* CAB International. *The Conservation of Natural Landscapes* (ed. M. Agnoletti).

prime example of how an historical fruit orchard within the boundaries of a prominent archaeological and cultural area has been recovered and transformed into a cultural asset for residents, visitors and future generations to learn and enjoy.

2.20   The elements highlighted in the article and that were helpful to understand the milieu of the area prior to the field assessment were the following: (i) the yellowish geological calcareous rock formations and alluvial soils; (ii) the highland and undulating hills upon which the city of Agrigento rests, as well as the ridge and esplanade of the Valley of the Temples and its eastern continuation towards the *Rupe Atenea*; (iii) the *Akragas* (today *San Biagio*) and *Hypsas* (today *Santa Anna*) rivers that contributed to shape the current irregular topography; (iv) the ubiquitous almond and olive trees; and (v) the deep narrow valley of the Kolymbetra with its unique topography, alluvial soils, microclimate and numerous hypogeals which, collectively, allow for the continuation of the cultivation of citrus orchards and vegetables next to the best preserved Greek temples outside of Greece. Recommendations for further positioning this cultural and natural asset are presented in the report.

2.21   It should be noted that an ex-post field trip assessment online research was also conducted. The results of this investigation were as follows:

> ➢ Information for the city of Agrigento and other destinations within the Province of Agrigento is extremely limited, dispersed and difficult to find
> ➢ Most database information for Agrigento tourism was found through third party and international travel websites
> ➢ There is no real legitimate information on YouTube for Agrigento
> ➢ Tour guide companies were not easy to find
> ➢ There are no legitimate reviews of the tours or guides
> ➢ There is no legitimate database for wineries in the Province and for the entire region of Sicily

2.22   This aspect is not favorable from the traveler consumer's point of view when searching for information and particularly for a description of tourism experiences in Agrigento. Today's traveling consumer who access content on the Web is extremely savvy and prefers to spend less time searching through numerous web sites. Consumers search for web sites that offer quality yet consolidated and functional information supported by technologies that will allow them to build social capital, i.e., being able to network to learn and share from other travelers' experiences. The lack of information and collaboration between Agrigento's tourism companies online suggests there is an opportunity to create sustainable systems of advertising and marketing.

2.23   The next section consists of the tourist information that was researched and documented on the Sicilian Province. Statistics, issues and challenges being faced at a regional level as well as other tourism factors and resources were researched to gain a better understanding of Sicily's appeal as a destination.

3.   **The Sicilian regional tourism context**

3.1   The official Sicilian Autonomous Region's tourism web site (*Assessorato Regionale dei Turismo*) provides valuable 2009-2010 statistical information on various central

elements regarding: (i) tourism arrivals and overnight stays; (ii) average lengths of stay for domestic and international visitors at the regional and provincial levels; (iii) bed capacity classified by hotel and other types of lodging; (iv) generating markets; (v) visitor satisfaction and other trip variables; (vi) the organizational structure, function and competencies of both the *Assessorato* and the *Dipartimento Regionale dei Turismo*; and (vii) official decrees and legislation such as, the criteria for the establishment and regulation of tourism districts, research studies and publications, news and links to tourism service information, as noted above in paragraphs 2.9 through 2.14.

3.2   Ensuing are a series of facts that are significant to highlight, as a result of the review that was undertaken. Comparing the 2009 and 2010 statistics for tourism flows, the total number of visitors who arrived in Sicily diminished from 4,058,214 registered in 2009 to 3,999,171 in 2010, a downward variation of -1.45%. In the case of the Province of Agrigento, the reduction was greater with a descending variation of -8.48% (406,921 vis-à-vis 372,411). The overnight stays, however, were overall positive for the Region and the Province of Agrigento - 1.62% and 2.19%, respectively. This situation needs further analysis to determine the set of factors that have contributed to this decrease in arrivals and whether it is the beginning of a trend that Sicilian and Agrigento tourism authorities and stakeholders should be concerned about.

3.3   Although arrivals diminished, the average length of stay for both domestic and international visitation increased slightly from 3.3 nights in 2009 to 3.4 nights in 2010. These figures take into account visitors staying in hotels, as well as other accommodations that include visiting friends and family (*extra alberghieri*). It is interesting to notice that the average length of stay for both Italian and international visitors who decide to stay at hotels are extremely close (3.2 vis-à-vis 3.4 [2010]), whereas staying in *extra alberghieri*, the average length of stay for Italians is higher by one night (4.4 vis-à-vis 3.5 – 2010). In the case of Agrigento, Italians spent more nights in the Province than international visitors: 4.2 nights versus 2.8 nights, averaging out to an overall length of stay of 3.6 nights.

3.4   This significant statistic can be an indicator that tourism products and services currently being offered in Agrigento are not attractive enough and of sufficient quality to retain international visitors to extend their overnight stay. Another indication could be the seasonality factor, which is explained in the following paragraphs (3.5 through 3.6 below). An added factor could be the manner by which the Agrigento tourism experience is being packaged and sold by tour operators to both the domestic and international markets. Further research and analysis is required.

3.5   The article titled: "Tourism seasonality in cultural destinations: Empirical evidence from Sicily" by authors Tiziana Cuccia and Ilde Rizzo, from the University of Catania,[134] investigates whether the cultural attractiveness of tourism destinations (supply side), is able to mitigate tourism seasonality (demand) in different destinations in Sicily. Tourist presence, as measured by overnight stays, was analyzed for the municipalities of

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[134] Cuccia, T. and Rizzo, I. (2010). *Tourism seasonality in cultural destinations: Empirical evidence from Sicily*. Tourism Management 32 (2011) 589-595. Science Direct. Elsevier Ltd.

Agrigento, Caltagirone, Piazza Armerina, Siracusa and *Taormina* and compared to the Aeolian Islands during the January 1998-December 2006 time period.[135]

3.6   Based on the analysis of this case study the results were as follows: (i) Italy and Sicily have similar degrees of seasonality with a peak in the summer season; however, there is a smaller difference between the peak summer season and the shoulder-seasons (Spring and Autumn) in Sicily than in the country as a whole; moreover, seasonality is on the rise in Sicily; (ii) *Taormina* has the highest seasonality explained by its high presence of foreign tourists (73%), whereas *Caltagirone* has the lowest due to its minor cultural heritage and in-land geographical location; (iii) destinations near the sea such as, *Agrigento, Taormina* and *Siracusa*, and despite that they possess significant cultural heritage, suffer from seasonality, which means that cultural heritage seems to play a less relevant role in reducing seasonality in tourism; and (iv) cultural destinations, as in the cases of *Piazza Armerina* and *Caltagirone*, have generally less seasonality in tourism flows. Policy issues and considerations for reducing seasonality and enhancing both the length of stay and sustainability are advanced at the end of this important case study.

3.7   In terms of registered hotel units and bed capacity, overall, there has been positive growth during the two-year 2009-2010 period. The total number of units for all hotel categories increased 3.2%, whereas bed capacity augmented 4.3%. For the *extra alberghiero*, however, the number of units decreased by -19.5%; consequently the number of available beds diminished by -11.0%. Taking into account the sum of these two categories, overall growth for the two-year period was negative (-14.2% for units and -1.8% for beds).

3.8   In the case of Agrigento, the trend was slightly positive. The total number of units for all hotel categories increased 0.9%, whereas bed capacity augmented 1.2%. For the *extra alberghiero*, the number of units increased by 10.9%; consequently the number of available beds increased by 4.1%. Overall growth for the two-year period was therefore positive for these two categories (7.6% for units and 2.1% for beds). The raise was due largely to the increase of B&Bs coming into the market.

3.9   The 5 most important ranked international outbound markets for Sicily for 2010 in terms of arrivals and overnight stays were the following: (i) France (302,303/1,009,080); (ii) Germany (257,433/975,014); (iii) USA (121,433/336,011)); (iv) Spain (102,013/236,550); and (v) United Kingdom (94,460/365,690). For the Province of Agrigento, the markets were the same with the following breakdown: (i) France (42,629/154,166); (ii) Germany (21,266/52,246); (iii) USA (12,663/23,489); (iv) Spain (9,948/22,275); and (v) UK (8,992/29,664).

3.10   The 5 most important ranked domestic regional markets for Sicily were: (i) *Lombardia* (247,887/1,041,380); (ii) *Lazio* (206,408/657,813); (iii) *Campania* (138,133/549,296); (iv) *Calabria* (99,896/290,863); and (v) *Piemonte* (93,846/342,523). For 2010, the number of Sicilians traveling and visiting within the island's territory amounted to 1,158,406 with 3,509,848 overnight stays. For the Province of Agrigento, the 5 most important ranked

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[135] The selection criteria for these destinations are fully explained in the article. These destinations were placed into two main categories: (i) both sun-and-sea and cultural destinations (Taormina, Agrigento and Siracusa); and (ii) pure cultural destinations (Caltagirone and Piazza Armerina). The seasonality data of these destination was compared to the seasonality of the Aeoliona Islands as the extreme case of a strictly sun-and-sea destination.

domestic regional markets for Sicily were: (i) *Lombardia* (30,071/180,934); (ii) *Lazio* ((14,466/62,893); (iii) *Veneto* (10,640/44,185); (iv) *Emilia Romagna* (9,504/42,338); and (v) *Piemonte* (9,218/41,558). The number of Sicilians traveling and visiting the Province of Agrigento at the end of 2010 amounted to 105,535 with 400,159 overnight stays.

3.11   There are three valuable research publications that were downloaded and examined for the purpose of understanding Sicily's tourist destination image and appeal: (i) *Ricerca di marketing sull'attrattività turistica della Sicilia;*[136] (ii) *Elementi di analisi dei principali mercati della domanda e di benchmarking*;[137] and (iii) *TripAdvisor.com e Destinazione Sicilia: Un'indagine nel mondo del travel 2.0.*[138]

3.12   The first study provides the results of a survey that, based on a series of functional and psychological questions, attempts to measure holistically the destination appeal and image of Sicily and its competitive position vis-à-vis other competitors within Italy, Europe and outside of Europe. It also attempts to measure visitors' satisfaction and their overall experience as a result of attending 3 events. The second study analyses the positioning and ranking of Italy and its provinces amongst the most important international outbound markets. In addition, it identifies the types of experiences these visitors prefer and are most attracted to when visiting Italy and its provinces. The third study is focused on how new information and communication technologies (ICTs) are transforming the consumer of tourism products and services with a special focus on social networking and consumer feedback as it pertains to the appeal of Sicily, as a destination.

3.13   Based on the results of the first study, Sicily by and large, scores very high with visitors having had a satisfying trip; recommending a trip to Sicily to family and friends; returning for vacation, including for a week-end and extended stay; and meeting a series of expectations before arriving. In terms of voting for some of the attributes the destination offers, the top 4 out of 10 were: (i) its cultural heritage; (ii) gastronomy; (iii) coastline and beaches, environment and landscape; and (iv) hospitality. The remaining attributes: price level, accommodation, services and accessibility and transportation scored lower. Climate, cultural heritage, hospitality and gastronomy also scored high amongst domestic and international visitors with regard to their overall opinion of Sicily and furthermore, these attributes were also the main reasons for visiting Sicily.

3.14   The destination of Sardinia, the second largest island in the Mediterranean after Sicily and before Crete, registered the highest score by both Italian and international visitors as an alternative to Sicily (75% and 61%, respectively), followed by: Puglia (69% - domestic) and Calabria (59% - domestic), and Tuscany (59% - international) and Puglia (53% - international). In terms of competitor countries within Europe, Spain and Greece scored the highest amongst domestic visitors: 77% and 73%, respectively; whereas it was 62% and 57% amongst international visitors. Outside Sicily and Europe, Italians preferred to visit Egypt (60%), the Red Sea (55%) and Tunisia (39%), whereas foreigners surveyed in Sicily preferred to visit United States (56%), Egypt (39%) and Brazil (37%).

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[136] *Conferenza Stampa* (2011). Palermo. Simulation Intelligence e IZI.

[137] Alba,Valentina (2011). *Regione Siciliana. Assessorato Turismo Sport e Spettacolo. Osservatorio Turistico*.

[138] Nasti, Ylenia (2011). *Regione Siciliana. Assessorato Turismo Sport e Spettacolo. Osservatorio Turistico*.

3.15   The second study corroborates the findings of the first marketing study in terms of Italy's favorable position amongst European visitors (France and Germany are the most important outbound markets for Italy and Sicily), as well as other international markets such as United States, Canada, Brazil, Argentina, Japan, China, Korea, Russia, Poland, Norway, Hungary, etc. The types of experience identified were varied. The most predominant, however, were the get-away-from-it-all relaxation experience to the cultural educational or learning experience, the latter explained by Italy's historical and cultural patrimony wealth.

3.16   The third study, as mentioned earlier, addresses the importance of understanding the increasing demand of the traveling consumer for accessing reliable and truthful online information about the type of experiences that a destination is capable of offering. Furthermore, it focuses on the growing usage of virtual technology throughout all phases of a trip ranging from personal websites, virtual communities (Facebook, Twitter, etc.), blogs, to mobile device applications' with the aim of enhancing communication and the exchange of information that will build social capital i.e., community building. The Trip Advisor analysis consisted in creating a "Sicilian Forum" to measure both the positive and negative factors pertaining to a series of destination attributes as perceived by insiders (local residents) familiar with the locality, and outsiders (potential visitors) who have not visited Sicily. The overall result is that Sicily has a positive image and destination appeal.

3.17   From a strategic marketing and market penetration point of view, the statistical information as well as the results of the studies mentioned above has important implications for both Sicily and Agrigento. It is evident that France, Germany, the United States, Spain and the United Kingdom are key markets. The number of visitors and the overnight stays these outbound markets generate is significant. The low average length of stay, however, is an issue that needs further analysis to determine the cause and measures to correct the situation.

3.18   The information regarding the types of experiences is extremely relevant since destinations must first understand the range of experience types chosen by visitors when visiting Sicily, to be able to compare and determine which type of experience and market segments can the destination offer on a competitive basis. Analyzing the impact of ICT on travel behavior is extremely important to research since tourism consumption is now a phenomenon that relies heavily on the use of technology. Consequently, the value chain suppliers at the destination level that offer and sell tourism products and services to the consumer through the Internet, need to understand exceptionally well the needs, wants and behaviors of the traveling consumer.

3.19   The article by Antoine Le Blanc titled: "Cultural Districts, A New Strategy for Regional Development? The South-East Cultural District in Sicily"[139] provides an excellent case study on a series of destination issues, challenges and lessons to be learned. They are exceptionally relevant to the current efforts in Agrigento and elsewhere in Sicily in connection with the organization and establishment of tourism districts, as a means to boost socio-economic development and consequently, reduce the high unemployment rate registered in the last two years in Sicily, which is by far higher than the Italian

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[139] Le Blanc, A. (2010). Regional Studies Association. Vol. 44.7, pp. 905-917.

average.

3.20   According to Le Blanc, there are numerous issues being faced by the *Val di Noto* South-East Cultural District that are demanding difficult decisions that if adopted with the necessary political support, should allow tourism development to thrive to improve the local socio-economic well-being of its residents through the conservation and promotion of the districts' baroque architectural and cultural heritage. The main issues highlighted by the author, within this new spatial and geographical unit (district), are as follows:

(i) The district's physical integrity and success depends more on the territory as a physical and social feature, rather than the architectural heritage product being offered by the original 8 municipalities (*Comuni*) that were placed on the UNESCO World Heritage List in 2002 (now there are 16 municipalities).[140] The total surface of the territory as a tourist destination is too vast and not a concentrated geographical area, which leads to major difficulties regarding territorial governance, financing and fiscal accountability. The population is too dispersed and divided unequally between the UNESCO cities. To be successful, the district's territory requires a well-organized and interconnected transportation system to facilitate accessibility, a well-maintained and functional infrastructure to support its residents and facilitate visitation, and an organization capable for articulating and managing the competitiveness of the district's entire geographical area;

(ii) There is a noticeable disconnect in integrating the cultural products and its related tourist services and activities into the local value chain systems in each of the municipalities that form the district, which hinders innovative processes and local entrepreneurship. Moreover, there is lack of high quality services based on homogeneous international quality standards.

(iii) Spatial discontinuity and geographical heterogeneity are two critical limiting development factors that are not being compensated by a coherent and effective communication network system that demands the concerted intervention of multiple stakeholders;

(iv) From a political and administrative viewpoint, the district constitutes an additional territorial management structure and system, which complicates the already difficult political and administrative system. This is further convoluted by: the complexity and rigidity of cultural heritage management laws; the multiplicity of institutional stakeholders and decision-makers; and the existence of other competing functional development institutions which are not located within the district's boundaries and that are subject to different levels of authority.

3.21   For the district to be successful as a functional tourism system and to be able to

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[140] The original 8 *Comuni* were: *Catania, Militello in Val di Catania, Caltagirone, Modica, Noto, Palazzolo Acreide, Ragusa and Scicli*. According to the *Distretto Sud Est* web site: http://www.distrettosudest.it/home.html, the current 16 *Comuni* are: *Acireale, Caltagirone, Cassaro, Catania, Ferla, Ispica, Mazzarino, Militello in Val di Catania, Modica, Noto, Palazzolo Acreide, Piazza Armerina, Ragusa, Scicli, Siracusa and Sortino*.

compete globally, the aggregation of local enterprises, organizations, including public institutions, and other key stakeholder groups and entities that are within the boundaries of the district's geographical area and that depend on tourism directly and indirectly to survive economically, need to work together, as team. If the real objective of the *Distretto* is tourism development, as stated in the *Piano di Sviluppo* indicated by Le Blanc, then higher levels of articulation, cooperation and coordination appears to be in line to advance the overall interests of the residents and local tourism industry of the area.

4.   The Italian tourism context

4.1   Several sources were consulted to understand the current and future direction of tourism in Italy. The World Travel and Tourism Council's (WTTC)[141] 2011 Economic Impact Study for Italy provides the statistical information and projections for both the direct and total contribution of Travel and Tourism (T&T) to Italy's Gross Domestic Product (GDP), employment, generation of exports and investment. In addition, it presents other significant spending components (domestic, leisure, and business) and Italy's ranking in terms of the absolute and relative contribution of T&T to GDP, and forecasted growth.   Following is a synopsis of the statistics pertaining to GDP, employment, exports and investment contained in the report:[142]

➢ The direct contribution of T&T to GDP is expected to be EUR$51.8bn (3.2% of total GDP) in 2011, rising by 2.6% per annum (pa) to EUR$66.9bn (3.7%) in 2021 (in constant 2011 prices); The total contribution to GDP, including its wider economic impacts, is forecast to rise by 2.0% pa from EUR$137.3bn (8.6% of GDP) in 2011 to EUR$168.0bn (9.2%) by 2021;

➢ Travel & Tourism is expected to support directly 853,000 jobs (3.7% of total employment) in 2011, rising by 1.6% pa to 1,001,000 jobs (4.3%) by 2021. The total contribution of T&T to employment, including jobs indirectly supported by the industry, is forecast to rise by 1.0% pa from 2,210,000 jobs (9.7% of total employment) in 2011 to 2,435,000 jobs (10.6%) by 2021;

➢ Italy is expected to attract in 2011, 45,392,000 international tourist arrivals (overnight visitors), generating EUR$34.5bn in visitor exports (8.1% of total exports - foreign visitor spending, including spending on transportation). By 2021, international tourist arrivals are forecast to total 70,434,000, an increase of 4.5% pa (in nominal terms) generating expenditure of EUR$44.3bn (6.7% of total exports); and

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[141] The WTTC is the business leaders' forum for travel and tourism. It conducts economic impact research tourism studies to assist and benefit both public and private sector decision-makers to further understand the significant role that tourism plays in the world economy and at the nation-state level. The comprehensive research that is undertaken uses the UN Statistics Division-approved Tourism Satellite Accounting methodology framework (TSA:RMF 2008), which quantifies only the direct contribution of Travel & Tourism. However, WTTC recognizes that Travel & Tourism's total contribution is much greater; therefore its annual research aims to capture its indirect and induced impacts.

[142] Travel and Tourism Economic Impact Study for Italy – 2011. World Travel and Tourism Council. London, UK.

➢ Travel & Tourism investment is estimated at EUR$12.7bn or 4.1% of total investment in 2011. It should rise by 1.7% pa to reach EUR$15.0bn (or 4.1%) of total investment in 2021.

4.2 The Travel and Tourism Competitiveness Report for 2011,[143] ranks Italy in position number 27 out of the 139 countries that were analyzed. This position is slightly an improvement over the 28th ranking position attained in 2009. Within the regulatory framework sub-index that encapsulates policy related elements that are under the purview of the government, Italy ranked 45. In the second sub-index related to the enabling business environment and infrastructure, the country ranked was 27. For the third sub-index that captures the human, cultural and natural elements of the country's endowments, the ranking attained was 15. To further understand these rankings, it is necessary to understand the criteria used to evaluate the 14 pillars that are allocated throughout the 3 sub-indices, as well as the different variables that support these pillars.

4.3 Overall, Italy's ranking position is positive. There are numerous notable competitive advantages that the country possesses. For example, it ranks very high in the following areas (1 or greater but less than 15): (i) time required to start a business (13); (ii) access to improved sanitation and drinking water (1); (iii) physician density (15); (iv) comprehensiveness of annual T&T data (1); (v) available seat kilometers on domestic carriers (12); (vi) available seat kilometers on international carriers (14); (vii) number of operating airlines (5); (viii) number of hotel rooms (10); (ix) presence of major car rental companies (1); (x) ATMs accepting Visa cards (8); (xi) mobile telephone subscribers (13); (xii) life expectancy (1); (xiii) number of World Heritage cultural (3); (xiv) number of international fairs and exhibitions (6) ; and (xiv) creative industries exports (5).

4.4 Areas were Italy ranked very low were the following (100 or greater but less than 139): (i) prevalence of foreign ownership (112); (ii) business impact of rules on Foreign Direct Investment (118); (iii) transparency of government policymaking (119); (iv) sustainability of T&T industry development (111); (v) carbon dioxide emissions (100); (vi) effectiveness of marketing and branding (108); (vii) quality of ground transport network (111); (viii) purchasing power parity (125); (ix) extent and effect of taxation (133); (x) fuel price levels (125); (xi) extent of staff training (127); and hiring and firing practices (129).[144]

4.5 The third source that was consulted and reviewed was the OECD's study on tourism for Italy.[145] This is an extremely comprehensive study on the country's tourism sector and industry. It is highly recommended to peruse to understand the main issues and policy challenges that need to be addressed in the short and medium-term by the Italian tourism authorities at the national, regional and municipal level, as well as by the

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[143] The World Economic Forum within the framework of the Centre publishes the Travel and Tourism Competitiveness Report 2011 for Global Competitiveness and Performance and the Industry Partnership Programme for Aviation, Travel & Tourism. The report is the fourth edition of the Travel & Tourism Competitiveness Index (TTCI). The aim of the TTCI, which covers a record 139 economies this year, is to provide a comprehensive strategic tool for measuring "the factors and policies that make it attractive to develop the T&T sector in different countries."

[144] See Annex 4 for Italy's T&T 2011 ranking and scoring report card.

[145] OECD (2011), OECD Studies on Tourism: Italy: Review of Issues and Policies, OECD Publishing. http://dx.doi.org/10.1787/9789264114258-en.

private sector and by the number of institutions, organizations, groups and individuals that, although not directly part of what might be called the travel and tourism industry, nevertheless exert influence on the behavior of those within the industry.

4.6 Given that the study is rather extensive consisting of 150 pages and divided into five chapters with numerous tables and figures, a summary for each of the chapter's study is directly quoted below. It should be noted that the recommendations within the following summaries support the findings of two previously discussed publications.

4.7 The first chapter addresses Italy's overall tourism profile and performance.

Tourism is one of Italy's most significant economic sectors, a major driver of exports for the Italian economy, an important contributor of jobs, and has long-term development potential. However, in the last decade the dynamics and the economic results of tourism in Italy have been less favorable than in the 1990s. Some of the key features identifying Italian tourism include the increase in the number of short trips, the rapid development of tourism in art cities, the strong growth of accommodation facilities other than hotels, and the very high proportion of micro-businesses. While Italy has a highly developed transport infrastructure, placing the country among the most developed, it is lagging behind in terms of recent transport infrastructure and inter-modality. While domestic tourism represents the major share of Italian tourism, the Italian tourism economy is highly internationalized, and inbound tourism to Italy has performed well over the last 20 years, in line with OECD average. However, productivity in tourism is decreasing, and will be an important issue to be addressed in the near future.

4.8 The second chapter speaks to tourism policy, organization and governance, areas where Italy needs to improve considerably.

While increased attention has been given to tourism, lack of integration of tourism policy into an overall development strategy remains problematic. As tourism is not exclusively within the remit of the state, Italy's regions are empowered to play an essential role in a variety of key tourism activities, including product development and marketing. The multiplicity of stakeholders active in tourism development and promotion represents a significant challenge in terms of organization and governance, and for the implementation of a coherent and efficient national tourism strategy. The development of a long-term integrated national tourism strategy, in partnership with all stakeholders from the private and public sectors, is required. Such a strategy would help optimize the use of resources, such as European funds, public and foreign investment, and would enable the coherent and coordinated development of tourism in Italy and its regions.

4.9 The third chapter emphasizes the need to improve the collection of statistical economic data given tourism's role as a productive activity and its potential to generate value added, employment, government income and other benefits to the country's economy.

> *Up-to-date economic information and tourism intelligence are considered very important public goods for the private sector. A modern system of tourism statistics has to provide timely and reliable information on tourism production and consumption aspects. Tourism statistics in Italy remain very fragmented, at the national, regional and local levels, and the review highlighted that users were often unsatisfied with the quantity and quality of tourism-related data available. Policy makers and business decision makers need access to precise and rigorous information about the economic significance of tourism and its various roles in the Italian economy, in order to monitor the development of tourism and to develop effective policies. A stronger co-operation between producers and end-users is necessary in order to improve the quality and timeliness of data in Italy. Such an approach would help to avoid duplication, support greater coherency of data, and produce appropriate information that meets the requirements of consumers.*

4.10   The fourth chapter addresses the necessity for re-engineering the country's established products, enhance its image and become more strategically savvy and aggressive in promoting itself and by attracting travelers from emerging markets in order to remain competitive.

> *The uniqueness and international significance of a country's resources are important factors in determining its tourism potential. The high number of unique UNESCO World Heritage sites and extensive offer of museums and similar institutions highlight Italy's position as one of the top cultural destinations in the world. It is clear that Italy continues to have a very strong international brand. However, the process of globalization has led to increased competition, and Italy, like many traditional destinations, must maintain an effective presence in international markets to ensure that products are visible on the global stage. Structural certainty, along with adequate and stable resources, is essential to enable the National Tourism Agency (ENIT) to plan strategically and maintain a continuous and effective presence in priority markets. While regions have responsibility for the development and promotion of tourism, they also cooperate with ENIT on specific promotional campaigns. However, there is evidence to suggest they could more effectively utilize the strong Italian umbrella brand to facilitate access to distant markets. The assessment of marketing and promotional campaigns is an important element of tourism evaluation and, on the whole, Italian tourism promotion is not sufficiently performance-oriented at this time.*

4.11   The fifth and final chapter is a section that addresses the critical area of human resource development relative to education and training for tourism.

> *The tourism experience is provided through personal interaction. The availability of staff with specific skills and competencies for each product and tourism experience is vital. Tourism managers and employees must be able to adapt to technological requirements, have language skills, and the flexibility to respond to quickly changing demands from clients. To maximize the potential of tourism over the long term, it is critical for Italy to develop and improve its education and training offer in the field of tourism in a way that will explicitly meet the needs of the Italian tourism industry stakeholders. At present there is both a quality and a quantity gap in the education and training available in Italy. Despite the fact that the number of tourism university courses has rapidly increased in recent years, the number of students has declined. The demand for higher education skills from the sector is also very weak, with the orientation of the courses not sufficiently market-oriented, and tourism businesses not playing an active role in the definition of content or course development. There is a need to enhance the transfer of knowledge from the education sector to the industry and develop an integrated approach closely associating the regions, the private sector and the education and training organizations.*

5.   Concluding remarks

5.1   With the exception perhaps of the official Sicilian Autonomous Region's tourism web site (*Assessorato Regionale dei Turismo*), and the Agrigento and the Valley of the Temples Travel Guide web site, the available information on travel and tourism that exists online for the Province of Agrigento, its capital and the Valley of the Temples, as previously indicated is limited, widely dispersed, disjointed and difficult to find. Tourism products (prices on packages [accommodation, transportation, food and beverages), itineraries, etc.), being offered for the different tourist attractions within the Province of Agrigento and for the city of Agrigento is also limited. Moreover, demographic and psychographic information, as well as visitors' preferences, group segmentation, chosen activities, and other key trip variables such as hospitality, safety, transportation, expenditures and attitudes towards the destination and its attractions is practically non-existent.

5.2   To compensate for this deficit, it was necessary to research online academic articles, statistics and studies. The outcome, however, was to a certain degree also deficient. Furthermore, collecting this information and analyzing it with the aim to better understand the image, appeal and the types of experience the Province and city of Agrigento can offer, as a tourist destination, was difficult and time consuming. This deficit is a key opportunity for tourism planners and operators to centralize and manage the information and research needs of the destination, especially taking into consideration its rich history and cultural heritage.

Annex 3: Websites Consulted after *In Situ* Assessment

Wikipedia
http://en.wikipedia.org/wiki/Agrigento
http://wikitravel.org/en/Agrigento

Agrigento and the Valley of the Temples Travel Guide
http://www.lavalledeitempli.eu/index.html

Travel Plan Italy
http://www.travelplan.it/agrigento_guide.htm

Think Sicily
http://www.thinksicily.com

Trip Advisor
http://www.tripadvisor.com/Tourism-g194662-Agrigento_Province_of_Agrigento_Sicily-Vacations.html

Sicily Travel
http://www.sicilytravel.net/index.html

Web site for regional tourism in Sicily:
http://www.regione.sicilia.it/turismo/web_turismo

Another very informative web site on Sicily:
http://www.bestofsicily.com/index.htm

A descriptive and useful Valley of the Temples web site:
http://www.comhera.org/agrigento.php?idioma=en

UNESCO's World Heritage Center
http://whc.unesco.org/en/list/831

UNESCO's Volunteer Program site:
http://whc.unesco.org/en/71

Facebook for World Heritage Sites in Sicily
http://www.facebook.com/pages/Unesco-World-Heritage-Sites-in-Sicily/157445294312455

Official web site for the Cultural District of South East Sicily:
http://www.distrettosudest.it/home.html

Agrigento's local news:
http://www.agrigentooggi.it

European Travel Commission recommended web site to visit Europe:
http://www.visiteurope.com
European Travel Commission Official Web site:
http://www.etc-corporate.org/

Italy's Official statistics web site:
http://www.istat.it/en/sicilia

Annex 4: Italy's Tourism Ranking, 2011

Italy

The Travel & Tourism Competitiveness Index in detail

INDICATOR	RANK/139
1st pillar: Policy rules and regulations	
1.01 Prevalence of foreign ownership	112
1.02 Property rights	69
1.03 Business impact of rules on FDI	118
1.04 Visa requirements*	42
1.05 Openness of bilateral Air Service Agreements*	30
1.06 Transparency of government policymaking	119
1.07 Time required to start a business*	**13**
1.08 Cost to start a business*	91
1.09 GATS commitments*	89
2nd pillar: Environmental sustainability	
2.01 Stringency of environmental regulation	56
2.02 Enforcement of environmental regulation	81
2.03 Sustainability of T&T industry development	111
2.04 Carbon dioxide emissions*	100
2.05 Particulate matter concentration*	46
2.06 Threatened species*	71
2.07 Environmental treaty ratification*	**16**
3rd pillar: Safety and security	
3.01 Business costs of terrorism	73
3.02 Reliability of police services	44
3.03 Business costs of crime and violence	92
3.04 Road traffic accidents*	**20**
4th pillar: Health and hygiene	
4.01 Physician density*	**15**
4.02 Access to improved sanitation*	**1**
4.03 Access to improved drinking water*	**1**
4.04 Hospital beds*	44
5th pillar: Prioritization of Travel & Tourism	
5.01 Government prioritization of the T&T industry	76
5.02 T&T government expenditure*	65
5.03 Effectiveness of marketing and branding	108
5.04 Comprehensiveness of annual T&T data*	**1**
5.05 Timeliness of providing monthly/quarterly T&T data*	63
6th pillar: Air transport infrastructure	
6.01 Quality of air transport infrastructure	84
6.02 Available seat kilometers, domestic*	**12**
6.03 Available seat kilometers, international*	**14**
6.04 Departures per 1,000 population*	45
6.05 Airport density*	70
6.06 Number of operating airlines*	**5**
6.07 International air transport network	94
7th pillar: Ground transport infrastructure	
7.01 Quality of roads	54
7.02 Quality of railroad infrastructure	39
7.03 Quality of port infrastructure	81
7.04 Quality of ground transport network	111
7.05 Road density*	**22**

INDICATOR	RANK/139
8th pillar: Tourism infrastructure	
8.01 Hotel rooms*	**10**
8.02 Presence of major car rental companies*	**1**
8.03 ATMs accepting Visa cards*	**8**
9th pillar: ICT infrastructure	
9.01 Extent of business Internet use	72
9.02 Internet users*	46
9.03 Telephone lines*	32
9.04 Broadband Internet subscribers*	30
9.05 Mobile telephone subscribers*	**13**
10th pillar: Price competitiveness in the T&T industry	
10.01 Ticket taxes and airport charges*	37
10.02 Purchasing power parity*	125
10.03 Extent and effect of taxation	133
10.04 Fuel price levels*	125
10.05 Hotel price index*	89
11th pillar: Human resources	
11.01 Primary education enrollment*	25
11.02 Secondary education enrollment*	25
11.03 Quality of the educational system	83
11.04 Local availability of research and training services	37
11.05 Extent of staff training	127
11.06 Hiring and firing practices	129
11.07 Ease of hiring foreign labor	54
11.08 HIV prevalence*	68
11.09 Business impact of HIV/AIDS	36
11.10 Life expectancy*	**2**
12th pillar: Affinity for Travel & Tourism	
12.01 Tourism openness*	99
12.02 Attitude of population toward foreign visitors	94
12.03 Extension of business trips recommended	74
13th pillar: Natural resources	
13.01 Number of World Heritage natural sites*	**17**
13.02 Protected areas*	53
13.03 Quality of the natural environment	82
13.04 Total known species*	71
14th pillar: Cultural resources	
14.01 Number of World Heritage cultural sites*	**3**
14.02 Sports stadiums*	45
14.03 Number of international fairs and exhibitions*	**6**
14.04 Creative industries exports*	**5**

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Notes: Ranks of notable competitive advantages are highlighted. An asterisk (*) indicates that data are from sources other than the World Economic Forum. For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Annex 5:   Agrigento: SWOT Analysis

This SWOT analysis is limited in scope because we did not want to repeat what has already been done in the several strategic plans. We decided to focus only on the Valley of the Temples and the *Centro Storico* based on our recommended flagship-hub-spokes product development approach. The spokes is taken care of with Cultural Attractions Evaluation that was undertaken of the natural and cultural assets (Annex 8).

Valley of the Temples SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
• World Heritage Site: a "must see" attraction in Sicily & extremely important "pulling power" • Large volume of visitors/year (600,000-700,000) • Significant natural and cultural resources within Archeological Park (e.g., Kolymbetra Garden, the Hellenistic-Roman and Roman-Punic quarters' ruins) • Accessible and wide-ranging site • Site visitation management plan for peak periods • Trained Licensed Guides • Web site and Wi-Fi audio system • Autonomous administration & high-qualified team of experts • UNESCO Management Plan for Park • Research projects partially funded with entrance fees • Agreements with Agrigento University and other Academic institutions • Excellent Regional Archeological Museum within Park periphery • Site produces and packages agricultural goods such as olive oil, olives, almonds, grapes and wine for promotion and public	• Majority of visitors are day visitors – limited stay at site and immediate environs: negligible economic impact • Subject to a high degree of seasonality due to climate conditions, organized school holidays, and summer paid leave • Lack of coordinated marketing for WHSite and Agrigento • Weak brand image of WHSite • Inadequate Visitor and Interpretation Center at entrance of Park • Building for purchasing entry tickets to the Park and toilet facilities are dated and aesthetically not attractive • Signage extremely poor • Handy-cap accessibility non-existent • Kolymbetra Garden and other significant areas that are accessible within the Park are not sufficiently promoted • Limited promotion for visiting the Temples and the Archaeological Museum as a package tour • Site visitation management plan limited to peak periods and not for visitation of potential areas • Licensed guides are not required to show and interpret other areas • Limited employment for local archaeological graduates from	• Targeting more aggressively FIT market segment through surveys, incentives, better interpretation • Measure seasonality patterns through research/surveys to design better management for activities for separate times • Strengthen WHSite brand as a destination brand • Construction and operation of a modern Visitor and Interpretation Center in accordance with international standards • Enhance signage in languages from most important outbound markets (FR, GR, USA, SP) • Design, implement and market handy-cap accessibility program • Enhancing Kolymbetra Garden visitation through greater number of events, marketing of agricultural products, creating a web site and establishing research opportunities • Strengthen linkages to enhance visitation to Regional Archaeological Museum, Almond Museum and Almond Research Laboratory • Reevaluate visitation management plan to enhance visitation and open	• Natural disasters (seismic temblors damage Temples) • Persistence of weak web site presence online • Increased visitation = increased environmental impacts on site if not managed • Inter-modal Omega Transportation System delayed for political and financial factors and as a result traffic congestion in periphery of site increases = more CO^2 emissions • Economic recession • Global shift in travel and tourism patterns • National competition: Italy has more UNESCO WHS than any other country • Regional competition (Segesta, Selinunte, Siracusa, etc.) • Unexpected transportation strikes block access to Temples during peak seasons • Unknown impacts from gasification plant to be built in Port Empedocle Unregulated development and construction of different types of buildings near boundaries of site ruin aesthetic appeal of current landscape and increase environmental and social effects • Unregulated development

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
relations • Almond Festival (*Sagra del Mandorlo in Fiore*) and other cultural events occur in the Valley/Archaeological Park • Occasional special exhibits: 16 large statues by Igor Mitorifrom • Almond Museum near site • Almond Research Laboratory recently established • Five-star hotel (*Villa Athena*) • Akragas Express Train	Agrigento University due to no vacancies in civil service jobs, and limited archaeological excavations and research opportunities • Scientific and academic research in other disciplines lacking • Lack and/or limited volunteer activities for Agrigento's Youth related to the conservation of the Valley of Temples natural and cultural resources • Cannot sell Park's agricultural products to public • Limited number of events • Web site not easily found in Web – not ranked in first ten places by Google • Interpretation of Temples on Wi-Fi audio system is fair to poor • Limited number of cultural events similar in scale to Almond Festival • Weak marketing of Akragas Express train service and high costs to operate • Unregulated traffic and congestion in periphery of archaeological park boundaries	new areas • Institutionalize a communication program with Temple Guides and Greek-Roman Archaeological Training Center • Create more research employment opportunities for local Archaeological students and other disciplines • Expand Scientific and Academic Agreements with more International Research and Academic Institutions • Institutionalize UNESCO's World Heritage Volunteers Project • Negotiate with UNESCO's World Heritage Center permission to sell agricultural goods • Establish Event Management Team and conduct market research to enhance strategy for cultural events • Use Villa Athena for hosting special events • Evaluate Akragas Express business and marketing model and implement measures • Enhance accessibility through Park with bicycle paths and other non-impact mobility devices like Segways • Reevaluate Wi-Fi audio system with Temple guides and visitor focus groups • Redo the Park's web site (e.g., undertake a Search Engine Optimization of Park's web site, change URL domain to English, etc.) • Partner with Trip Advisor • Design and implement social media marketing strategy (Facebook, Twitter, etc.) • Seek new partnerships with US and European tour operators	and construction of different types of buildings near boundaries of site ruin aesthetic appeal of current landscape and increase environmental and social effects • Pandemics/epidemics

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
		• Organize annual major world music festival at Temples, perhaps at time of Almond Festival.	

Centro Storico SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

• Close to the Valley of the Temples
• Accessible by car, public bus and train
• Physically connected to Viale della Vittoria
• Significant historical and religious buildings (*Palazzos* Cathedral, Basilicas, Churches, Abbey) with distinguished architecture dating from the XIV century through the Neoclassical era with a plethora of art work and artifacts
• Picturesque Piazzas, Vias, and alley ways
• Scenic and panoramic viewpoints of Valley of Temples and Mediterranean Sea
• Luigi Pirandello Theatre
• Regional Library-Museum Luigi Pirandello
• Paleontology Museum
• Civic Museum
• *Pinacoteca* (Picture Gallery)
• Permanent collection of Agrigentine handicrafts (*Stoài*)
• *Posta Vecchia* Theatre
• Important religious manifestations and cultural and gastronomic events
• Increasing availability of B&Bs, restaurants, bars and retail shops and increasing hospitality awareness on need to improve quality and customer service
• Vital stakeholder
	• Centro Storico's cultural heritage not linked to the Valley of the Temples ("the flagship")or to tours in surrounding areas ("the spokes")
	• No sustainability and scant quality/service standards or training
	• Negligible attention to interests and demands of high value international travelers
	• Limited accessibility due to:
	  - Suspended train service
	  - Unreliable bus service
	  - Traffic congestion
	  - Limited parking space
	  - Limited traffic-free pedestrian mobility - limited only to Via Atenea during certain days and hours
	  - No bicycle lanes
	• Access and signage for disabled and handy-cap individuals absent
	• Poor signage for both vehicle and pedestrian mobility
	• Signage only in Italian
	• Tourist signage for cultural heritage buildings lacking and/or limited
	• Tourist signage directions for Valley of the Temples absent
	• Lack of Tourist Information Center(s)
	• Various historical buildings in disrepair = require renovation and maintenance
	• Several neighborhoods within historical city boundaries abandoned for years = urban and environmental degradation
	• Lack of green areas and landscaping in Piazzas and
		• Implement the planned actions of the PIT 34/PISU-PIST strategic framework to address the following elements:
		  - Position the cultural heritage of the historical center of Agrigento with the envisaged brand of "Agrigento: City of Art"
		  - Enhance the overall accessibility to and from the Valley of the Temples and other key entry and exit points to the historical center
		  - Designate pedestrian mobility zones in accordance with a management plan for accessing and visiting cultural historical assets (including disabled and handy-cap) and carbon neutral friendly means of transportation (electric bicycles, natural gas shuttles)
		  - Requalification of historical buildings (including residential) for renovation by: establishing an agency specifically with the mandate to re-qualify buildings and research laboratory and training center for students and artisans to further investigate these historical buildings in terms of their history (ownership, original architecture, color, etc.)
		  - Restoring and enhancing
			• Lack of political will, governance and/or delayed government funding to implement the PIT 34/PISU-PIST strategic framework
			• Lack of cooperation between public sector and local tourism industry
			• Persistence of infrastructure and renovation challenges
			• Persistence of web site absence
			• Local resident opposition to changes proposed
			• Visitation diminishes due to high-levels of CO^2 pollution due to increased uncontrolled vehicular traffic and new building construction, as well as increase in crime
			• Economic recession
			• Global shift in travel and tourism patterns
			• Regional competition (Taormina, Siracusa, Noto, Ragusa, Caltagirone, etc.)
			• Natural disasters (seismic temblors and landslides) cause severe damage to cultural heritage assets
			• Pandemics/epidemics
			• Immigration pressures due to conficts and catastrophes in nearby countries
			• No apparent initiatives to bring immigrants (African and Arabs especially) to tourism sector through arts, restaurants, handicrafts, music, etc.
			.

organizations with energetic entrepreneurs (*Camera di Commercio, Amministrazione Comunale, Associazione dei Commercianti and Centro Commerciali Naturali Via Atenea e Dintorni-CCN*) • Association of B&Bs • Knowledgeable and specialized guides on city's history and culture • Available human resources, especially youth for employing in revitalization of historical center	throughout the historical center • Several neighborhoods with low-income families • Crime increasing in certain areas • Ownership and titling of historical residential buildings/properties questionable = cannot renovate without owners' permission • Urbanization and illegal building caused by improper land use due to lack of and/or unenforced regulatory framework • Scenic views of Valley of the Temples and Mediterranean Sea blocked by unaesthetic high-rise condominiums that were built illegally and/or in violation of city's building codes and by billboard advertisements • Limited water supply and problems with: raw and commercial sewage sanitation; drainage; solid waste disposal; reliable energy connectivity, street illumination and telecommunications (land phone lines and installation of Wi-Fi antennas and facilities) • Churches are not always open • Limited number of B&Bs (only 15) = limited bed capacity = limits length of stay • Association of B&Bs not functional • Taxation regulation and recording issues with B&Bs • Limited number of restaurants and bars • Quality of food and service is an issue • Visitation of cultural heritage (buildings, churches, museums, etc.) not organized • Cultural heritage events not well-organized and promoted • Specialized guides limited in terms of language capabilities • Local residents indifferent to tourism potential development in the historical center • Connectivity to and from Via Valle della Vittoria non-functional	religious buildings - Requalification of urban traffic infrastructure for enhancing tourist visitation flows through the city including parking zones for rental cars, tourist buses and shuttles to and from the Valley of the Temples, tourist signage, illumination of streets, sidewalk improvement - Use of innovative technologies for the production and saving of energy, including solar thermal and photovoltaic technologies on a pilot basis intervention on buildings and public facilities, incentivizing public-private partnerships and financing. - Raise the environmental quality of living in the historical center with the implementation of international environmental 'green' standards for the city and its immediate surroundings (including better management of the water distribution system, wastewater and the collection and treatment of waste) • Boost the economic commercial activity in the Centro Storico by: - Strengthening ongoing commercial retailers' efforts and provide fiscal incentives to young entrepreneurs for establishing new businesses - Improve regulation and restore functionality of B&Bs Association and provide incentives for more B&Bs with improved quality customer service - Study the feasibility of moving the entire University of Agrigento (Polo Universitario) into the	

	• Urban Municipal Plan not fully implemented • Municipal web site for tourist information services (*Servizi per il Turista*) deficient in content and linkages and (not language friendly with other foreign languages) • Most hotels not located in Centro Storio • Lack of ATM machines	historical center with residences for students and space for classrooms and the University's administration - Establish a museum that will showcase the cultural heritage of Agrigento	
		• Train B&Bs and Agrigento hospitality enterprises in implementation of quality hospitality customer service and sustainability best practices • Support certification of tourism services by adapting international standards • Enhance planning, organization and marketing of cultural events and festivals on an annual basis • Implement the designed cultural heritage circuit itineraries and trails guides to highlight the cultural assets of the historical center • Establish and equip Visitation Center and Tourist Information kiosks • Establish a DMO that will have the mandate and responsibility for coordinating, articulating and implementing the strategic framework plans for the historical center in close coordination with the municipal government, private sector and other stakeholders • Create Cultural Tourism Web site • Establish a "Friends of Cultural Tourism Agrigento" program with a donations/membership framework	

Annex 6: Global Sustainable Tourism Criteria

These criteria are now being used by tourism businesses and destinations around the world to set basic benchmarks for achieving sustainability. We believe that they can provide basic benchmarks for businesses in Agrigento.

The criteria are part of the response of the tourism community to the global challenges of the United Nations' Millennium Development Goals. Poverty alleviation and environmental sustainability – including climate change – are the main cross-cutting issues that are addressed through the criteria. The criteria indicate **what should be done, not how to do it or whether the goal has been achieved.** This role is fulfilled by performance indicators, associated educational materials, and access to tools for implementation, all of which are an indispensable complement to the Global Sustainable Tourism Criteria.

A.   Demonstrate effective sustainable management.

- A.1. The company has implemented a long-term sustainability management system that is suitable to its reality and scale, and that considers environmental, sociocultural, quality, health, and safety issues.
- A.2. The company is in compliance with all relevant international or local legislation and regulations (including, among others, health, safety, labor, and environmental aspects).
- A.3. All personnel receive periodic training regarding their role in the management of environmental, sociocultural, health, and safety practices.
- A.4. Customer satisfaction is measured and corrective action taken where appropriate.
- A.5. Promotional materials are accurate and complete and do not promise more than can be delivered by the business.
- A.6. Design and construction of buildings and infrastructure:
    - A.6.1. comply with local zoning and protected or heritage area requirements;
    - A.6.2. respect the natural or cultural heritage surroundings in siting, design, impact assessment, and land rights and acquisition;
    - A.6.3 use locally appropriate principles of sustainable construction;
    - A.6.4 provide access for persons with special needs.
- A.7. Information about and interpretation of the natural surroundings, local culture, and cultural heritage is provided to customers, as well as explaining appropriate behavior while visiting natural areas, living cultures, and cultural heritage sites.

 B.   Maximize social and economic benefits to the local community and minimize negative impacts.

- B.1. The company actively supports initiatives for social and infrastructure community development including, among others, education, health, and sanitation.
- B.2. Local residents are employed, including in management positions. Training is offered as necessary.
- B.3. Local and fair-trade services and goods are purchased by the business, where available.
- B.4. The company offers the means for local small entrepreneurs to develop and sell sustainable products that are based on the area's nature, history, and culture (including food and drink, crafts, performance arts, agricultural products, etc.).
- B.5. A code of conduct for activities in indigenous and local communities has been developed, with the consent of and in collaboration with the community.
- B.6. The company has implemented a policy against commercial exploitation, particularly of children and adolescents, including sexual exploitation.
- B.7. The company is equitable in hiring women and local minorities, including in management positions, while restraining child labor.
- B.8. The international or national legal protection of employees is respected, and employees are paid a living wage.
- B.9. The activities of the company do not jeopardize the provision of basic services, such as water, energy, or sanitation, to neighboring communities.

C. Maximize benefits to cultural heritage and minimize negative impacts.

- C.1. The company follows established guidelines or a code of behavior for visits to culturally or historically sensitive sites, in order to minimize visitor impact and maximize enjoyment.
- C.2. Historical and archeological artifacts are not sold, traded, or displayed, except as permitted by law.
- C.3. The business contributes to the protection of local historical, archeological, culturally, and spiritually important properties and sites, and does not impede access to them by local residents.
- C.4 The business uses elements of local art, architecture, or cultural heritage in its operations, design, decoration, food, or shops; while respecting the intellectual property rights of local communities.

D. Maximize benefits to the environment and minimize negative impacts.

- D.1. Conserving resources
    - D.1.1. Purchasing policy favors environmentally friendly products for building materials, capital goods, food, and consumables.
    - D.1.2. The purchase of disposable and consumable goods is measured, and the business actively seeks ways to reduce their use.

- o D.1.3. Energy consumption should be measured, sources indicated, and measures to decrease overall consumption should be adopted, while encouraging the use of renewable energy.
  - o D.1.4. Water consumption should be measured, sources indicated, and measures to decrease overall consumption should be adopted.
- D.2.   Reducing pollution
  - o D.2.1. Greenhouse gas emissions from all sources controlled by the business are measured, and procedures are implemented to reduce and offset them as a way to achieve climate neutrality.
  - o D.2.2. Wastewater, including gray water, is treated effectively and reused where possible.
  - o D.2.3. A solid waste management plan is implemented, with quantitative goals to minimize waste that is not reused or recycled.
  - o D.2.4. The use of harmful substances, including pesticides, paints, swimming pool disinfectants, and cleaning materials, is minimized; substituted, when available, by innocuous products; and all chemical use is properly managed.
  - o D.2.5. The business implements practices to reduce pollution from noise, light, runoff, erosion, ozone-depleting compounds, and air and soil contaminants.
- D.3.   Conserving biodiversity, ecosystems, and landscapes
  - o D.3.1. Wildlife species are only harvested from the wild, consumed, displayed, sold, or internationally traded, as part of a regulated activity that ensures that their utilization is sustainable.
  - o D.3.2. No captive wildlife is held, except for properly regulated activities, and living specimens of protected wildlife species are only kept by those authorized and suitably equipped to house and care for them.
  - o D.3.3. The business uses native species for landscaping and restoration, and takes measures to avoid the introduction of invasive alien species.
  - o D.3.4. The business contributes to the support of biodiversity conservation, including supporting natural protected areas and areas of high biodiversity value.
  - o D.3.5. Interactions with wildlife must not produce adverse effects on the viability of populations in the wild; and any disturbance of natural ecosystems is minimized, rehabilitated, and there is a compensatory contribution to conservation management.

Source: GSTC Criteria, http://new.gstcouncil.org/resource-center/gstc-criteria

Annex 7: Agrigento/Temples: English & Italian Language Websites Analysis

Annex 7: Agrigento & Valley of the Temples: Analysis of English & Italian Language Websites

1 = mention; 3 = some details 5 = in depth

URL	Name of Site	Valley of the Temples	Other Archeology	Food	Agritourism	Wineries	City of Agrigento	Small towns	Reserves	Beaches	Water Sports	Literary	Festivals	Biking
Database Information														
http://sicilia.indettaglio.it/eng/turismo/ag/turismoag.html	Sicilia Indettaglio	5	4											
http://goitaly.about.com/od/agrigento/p/agrigento.htm	About.com	4	4	3			2	1	2					
http://www.planetware.com/tourist-attractions-agrigento-i-si-ag.htm	Planet ware.com	4	5				3	2	2				3	
http://www.officeoftourism.org/europe/italy/Sicily/agrigento.asp	Office of Tourism	5	5				1							
http://wikitravel.org/en/Agrigento	Wikitravel	4	4	1			1						1	
http://www.travelplan.it/agrigento_guide.htm	Travel Plan IT	4	4	4			1	3	1				3	
http://en.sicilia.waf.it/museo.html	Weekend in Italy	5	5					3						
http://www.sicilytravel.net/	Sicily Travel	4	4				3	2				3		
http://www.travbuddy.com/Agrigento-travel-guide-276597	Travel Buddy	3	3				2	1						
ACTIVITIES														
http://sicilyguide.com/what-to-do/cities/agrigento/	Sicily Guide	3	3	1			2						1	
http://www.sicilsurf.it/	Sicily Surf							3		3	4			
http://www.hikenow.net/Agrigento-Sicily.html	Hike Now	4	2				2	1						
http://www.parcodeitempli.net/	Parco Valle Dei Templi	5	5	2	4		1	1						
http://www.crewlopez.com/en/home.html	Crew Lopez						1	1	2	3	5			
http://www.coast2coast.it/index.php?lang=en	Coast2Coast	2	3						5	1				5
TOURS														
www.wellarrangedtravel.com/tours/private_tours/italy/tour_Piazza-Armerina- Agrigento-Sicily.html	Well Arranged Travel	1	1											
http://www.agrigentoexperience.com/	Agrigento Experience	3	2		2		2							
http://www.agrigentotourguides.com/	Agrigento Tour Guides	4	4				2	4				3		
http://www.agrigentoexcursions.com/agrigento_tours.htm	Agrigento Excursions	2	2	2			1		1	1				
http://www.prestotours.com/ancient-agrigento-tour.php	Presto Tours	3	3											
http://www.amberroadtours.com/sicily.php	Amber Road Tours	2	2											
http://www.valleyofthetemples.com/Visitagrigento.htm	Valley of the Temples	3	1											
COMMON GUIDE BOOK INFORMATION														
http://www.frommers.com/destinations/agrigento/	Frommers	4	3	4			2	2		1				
http://www.letsgo.com/409-southern_sicily-travel-guides-agrigento-d	Let's Go	5	5	4			4	3	3	4		4	5	
http://www.roughguides.com/travel/europe/italy/sicily/agrigento.aspx	Rough Guides	4	4				3	3						

Annex 8: Agrigento Cultural & Natural Attractions Inventory Scorecard

LOCATION: town	Resource Type: Culture/Heritage, Natural/Recreational (Adventure), other	Quality of Management: examining cleanliness, degradation, sustainable operations. (1=polluted/overused, 10=pristine/used to sustainable capacity)	Infrastructure: appropriate to site and suitable to foreign market; captures soft infrastructure elements such as language skills, trail maps, toilets etc. (1 = infrastructure unsuitable for site or site lacks necessary infrastructure; 10= infrastructure perfectly tuned to site personality, perfectly fills needs)	Quality of enjoyment: for activity, whether it be nature, culture or sport (1 = site offers low level of enjoyment; 10 = site offers highest level of enjoyment)	Quality of preservation/conservation: (1 = site has been degraded by use; 10= site is in pristine condition)	Uniqueness to foreign market: (1= can easily be found elsewhere in the world; 10 = found only in Agrigento)	Authenticity: (1= contrived/manufactured; 10= true to original nature, un-enhanced)	Journey experience to the site: takes into account hard infrastructure such as quality of roads (1= the journey detracts from the experience, 10= journey enhances the experience even if the road is rough, for example)	Local benefits: community participates or receives direct benefit from tourism to the site (1 = community receives no benefit and 10 = community receives maximum benefit)	Potential for improvement to the site: (1 = investment would greatly enhance site/experience; 10 = investment will lead to no improvement. This does not mean investment must be significant to greatly improve a site - sometimes a simple sign is a great improvement.)	Readiness: takes into account hard infrastructure existence such as lodging in vicinity and the level of site product development (1 = no product development and 10 = they can take guests immediately)	Ease of itinerary incorporation: (1 = not easily incorporated; 10 = easily incorporated)	Total Points
Caltabellotta	Culture/ Heritage	7	6	6	8	10	8	10	6	10	9	10	8.2
Burgio	Culture/ Heritage	5	6	8	6	10	8	10	6	10	9	10	8.0
Eraclea Minoa	Culture/ Heritage	5	6	6	10	10	8	10	5	10	10	10	8.2
Licata	Culture/ Heritage	6	6	5	5	7	7	6	6	10	10	10	7.1

Comitini	Culture/ Heritage	7	6	10	10	8	8	10	4	10	5	10	8.0
Sant'angelo Muxaro	Culture/ Heritage	7	7	8	8	10	10	9	10	10	9	10	8.9
Sciacca	Culture/ Heritage	7	7	7	7	7	7	8	9	10	9	10	8.0
Santo Stefano Quisquina	Natural/ Recreational	7	7	8	9	10	9	8	9	10	9	8	8.55
Riserva Foce del Platani	Natural/ Recreational	5	7	10	10	9	10	8	5	10	7	10	8.3
Maccalubbe	Natural/ Recreational	6	5	10	10	9	8	8	5	10	5	10	7.8
Torre Salsa	Natural/ Recreational	8	7	10	10	10	10	10	8	10	5	10	8.9
Monte Cammarata	Natural/ Recreational	7	7	10	10	8	8	8	8	10	8	8	8.4
Attractions Visited outside the Area of Study													
Riserva Sant'angelo Muxaro	Culture/ Heritage/ Natural	7	8	8	10	10	10	9	-	-	-	-	5.6