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Analysis of tourism in Campania as a tool for the development of high-quality cultural services for sightseers: The "Reale Osservatorio Vesuviano" case history

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Abstract

The purpose of this work is to identify the guidelines for the development and diversification of the cultural touristic offer achievable at the Reale Osservatorio Vesuviano (ROV). Founded in 1841, it is the oldest volcano observatory in the world and it has always had the vocation for scientific-naturalistic and formative tourism. The present study investigates the connections between the sociology of tourism and the ROV's sustainability and competitiveness as a tourist destination. Here it is performed a study of the tourist flow, based on the sociology of tourism and on the correct processing of data sets, distinguishing the "statistical information on tourism" from "tourism statistics", as such a study is the basis of a proper market strategy in different sectors. Tourism remains, in fact, an important phenomenon in world economy: despite the economic crisis of recent years, international tourist arrivals show a positive development of the trend in all the major sub-areas into which the large international areas are traditionally divided. The principles for a future marketing plan were outlined after collecting all the relevant information. The plan was designed to enhance the overall touristic offer of the ROV, never ceasing to consider the integration of natural-scientific aspects and cultural events to be offered within the observatory itself.

Resumo

O objetivo deste trabalho é identificar as orientações para o desenvolvimento e diversificação da oferta turística cultural realizáveis no Reale Osservatorio Vesuviano (ROV). Fundada em 1841, é o mais antigo observatório vulcão do mundo e sempre teve a vocação para o turismo científico-naturalista e formativo. O presente estudo investiga as conexões entre a sociologia do turismo e sustentabilidade do ROV e competitividade como um destino turístico. Aqui é realizado um estudo do fluxo turístico, com base na sociologia do turismo e sobre o tratamento correto de conjuntos de dados, distinguindo “informações estatísticas sobre o turismo" de "estatísticas do turismo"; como um tal estudo é a base de um estratégia de mercado adequada em diferentes setores do turismo continua a ser, de facto, um fenómeno importante na economia mundial. Apesar da crise económica dos últimos anos, as chegadas de turistas internacionais mostram uma evolução positiva da tendência em todas as principais sub-áreas em que as grandes áreas internacionais são tradicionalmente divididas. Os princípios para um plano de marketing futuro foram delineados após a recolha de toda a informação relevante. O plano foi projetado para melhorar a oferta turística global do ROV, não deixando de considerar a integração dos aspetos naturais-científicos e eventos culturais a serem oferecidas dentro do próprio observatório.

Introduction

The economic crisis has in recent years brought a "hit and run" tourism with 4/5 sightseers staying in their own country. However, international tourist arrivals have had a positive trend in the last few decades (UNWTO, 2013).

In this context, the National Institute of Geophysics and Volcanology (INGV) have, along with its institutional duties, the aim of developing its own cultural offer. The INGV was founded with the goal of collecting, in a single pole, the main national scientific institutions in the sectors of geophysics and volcanology. This specific objective is mainly pursued through the Reale Osservatorio Vesuviano (ROV), the Naples branch of the INGV that is the oldest volcanological observatory in the world. It is located on the western side of the Vesuvius, the famous volcano situated in the province of Naples (Ithaly), in the territory of the National Park. In 1997, Vesuvius was elected by UNESCO as one of the world's biosphere reserves.

Since 1970 the ROV has been the place for the preservation of its precious mineralogical, instrumental and art collections, as well as a rich historical library. From 2005 to 2013 it has been visited by an average of 11,000 people per year, most of them students. Entrance is currently free of charge and there are no commercial areas in the ROV's surroundings. Moreover, no promotional plans have ever been drawn up to attract at least a part of the 500,000 or so paying visitors who reach the Vesuvius crater every year, passing close to the ROV. Despite its weaknessess, the huge potential of such a socio-cultural and economic development has prompted us to make legal and economic considerations in order to set up an appropriate business and marketing strategy (Sangianantoni et al., 2014).

The purpose of this work is to propose guidelines for the development and the diversification of the touristic and cultural offer achievable at the ROV.

This study, focused on the development section of the work, was dedicated to the working out of statistical surveys (qualitative and quantitative) that exist for the current trend in the flow of tourists in the various sites previously identified on the basis of the type of people and months of the year.

The methodology of the study was based on the sociology of tourism as an essential tool to fully understand what the need of today's tourist is and then formulate a market strategy. Different types of tourism were than examined, from the most established forms (e.g., cultural, natural-hiking, rural, artistic and gastronomic) to those, which are lesser known (e.g., "discovery or itinerant", "specialised scientific" and others).

The study of the tourism context is, then, strongly connected and linked to the field of geophysical sciences as it forms the basis for the planning of efficient organisation and to allow sufficient revenues for the routine maintenance and the relaunching of each of the INGV's informative structures. After collecting all the relevant information, the principles for a future marketing plan were outlined. This was designed to enhance the overall touristic offer of the ROV, never ceasing to consider the integration of natural-scientific aspects and cultural events to be offered within the observatory itself.

Historical Evolution of Tourism in Campania Linked to Changes in Society

Since ancient times, Campania has been the one of the Mediterranean regions with the highest number of tourists, due not only to its many beach resorts but also to the presence of the Phlegree Islands and spa tourism.

In particular, fascinating and mysterious volcanoes were very often the basis of tourism revivals in Campania - despite the danger, ash and other volcanic products in time made (and make) the land particularly fertile with rich harvests.

The land of volcanoes reached its glory in the imperial era (Mattera, 2011) especially from the first century (around the year 50) when the protagonists of Roman public life (such as Nero, Cicero, Tiberius, Pollio and others) built luxurious villas of otium (summer residences intended for leisure) immersed in extraordinary bucolic landscapes and exclusive bays especially emphasising the intense hydrothermal activity.

Things changed after the famous eruption of Vesuvius in 79 AD, after which the pearls of the Empire (Pompeii, Ercolano and Oplonti) were completely buried. This event removed inhabitants and tourism but paradoxically, over time, had the merit of preserving the splendours from the wreckage of this ancient land. The first excavations of Pompeii began in 1748. Only in 1950 thanks to Buchner (1984) were the remains of the ancient city, also buried by volcanic eruptions, brought to light.

With the rediscovery of their artistic beauty, the volcanic cities regained their ancient charm. In the eighteenth century, both Solfatara and Vesuvius became necessary stops of the Grand Tour - the journey of the European aristocracy that served as an educational rite of passage.

During the second half of the nineteenth century, Campania, and Naples in particular, became a centre of attraction for those with a European culture who were seeking both natural and cultural delights. In the twentieth century, which was chaotic and not very sensitive to the protection of the environment economic development, the Campania volcanoes (with the exception of Vesuvius, Solfatara and the island of Ischia) were gradually abandoned. The exploitation of the waters continued because they produced wealth, but no revaluation policy of the volcanic sites started (Mattera, 2011).

It is recognized that we must not aim at the creation of new artificial goals to motivate and increase the flow of tourists in these areas because they are already full of morphological, historical and cultural elements that are attractive for tourists. We must, however, appreciate traditions and local products through concrete promotional measures, the implementation of accommodation services and marketing.

Tourism Observers Activity as a Tool to Support the Programming Requirements of Statistical Information on Tourism

Tourism is a transversal phenomenon for the economic sectors that characterize it but also for the companies operating in that sector. The service activities that characterize it are, in fact, very different, including transport, tourism promotion, recreation management and park management, as well as activities related to local food and wine. Despite this embracing attitude, it is possible to define a tourist-related "industry" within the services and economic units that operate in this area and they represent a well-defined statistical collective.

The statistical representation of such complex and diverse phenomenon is inevitably both conceptually and methodologically difficult. The rediscovery of territory and local identity through the promotion of a network of small businesses was considered to be a mean to enhance the competitiveness and innovation of the industry. This is the main reason why, for example, the harmonised statistics on employment in tourism were not disclosed for a long time, since much of the analysis carried out (OECD, 2011) has preferred to estimate employment in tourism, limiting the analysis to the HO.RE.CA activities only.

But at the moment none of these trends is represented by tourism statistics.

In this extremely complex context, where tourism policy initiatives cannot really depend on tourism, it is necessary to define the statistical requirements necessary at the local level in order to achieve some important goals. Statistical information should in fact allow local policy makers to *make a long-term plan, assessing the sustainability of activities*. It follows that statistical information should have a modular structure (*transversal*), in order to be able to meet the different needs of different operators:

- a first form should be aimed at the monitoring and evaluation of the policies implemented;
- a second form ought to respond to the need for variables/indicators (pressure indicators) to measure whether the form of the development of tourism in the local area is compatible with the character and the resources of the host communities and destinations (Russo & Antolini, 2013).
- a third form should provide a framework of the indicators for impact generated employment, income generation and, ultimately, the level of prices.

The price level, particularly of services, may also impact on the competitiveness of the tourism industry by changing both the incoming of people and the socio-economic profile of the tourist.

The statistical information on tourism, however, in addition to being transversal must be *multi-layer*, at least in Italy, where the existence of decentralised governance can produce failures in policy coordination. Having consistent and relevant statistical information can contribute to impove the competitiveness of territories, avoiding a not correct use of statistics. Examining, for example, the Competitivness Tourism Report, in 2011 Italy was 27th in the Global Index, and 1st. in the infrastructure for tourism index. The issue is particularly important because the infrastructure improves the quality of the services and can facilitate the mobility of people. But if we look in analytical way the index of infrastructure, we can observe a lack of representativeness of the indicator just described: "Car rentals" and "number of rooms in hotels" contribute positively to the rankings mentioned. But regarding Italy, there is a situation of circularity that makes the indicator for infrastructure unrepresentative. In fact, considering that in Italy cars are the means of transport mainly used, the indicator “car rentals” should be interpreted as a sign of inefficiency, being an indirect representation of the poor use of the public transport system. With respect to the number of rooms (beds), it is necessary to analyse those occupied in relation to those available, as evaluating only the available rooms could lead to wrong interpretations.

Research on Statistical Surveys of Existing Tourism in Campania

Note on Methodology and Data Limits

It was decided to start from the scenario of international tourism, to advance to the Italian context, and finally to analyse the local dynamics, by the need to ensure that the analysis related to the development of the ROV is not out of context and does not have ties to the global tourist market.

For each source identified all the available data relating to the flow of tourists were collected, primarily in terms of the number of arrivals, registrations and average length of stay. As the latter figure is not always available, it was deduced and plotted by knowing arrivals and presences, as:

- ***tourist arrivals***, the number of customers, both italian and foreign, all accommodated within a period;
- ***number of tourists***, the number of nights spent by guests in accommodation, hotels or complementary businesses;
- ***average stay***, the ratio between the arrivals and presences.

The analysis of all the data collected was complex because not all the sources are updated and the data are often reported with different details. Also discordant values are commonly found between the evaluations of entities that provide official data, due to different reference fields. For exemples The ISTAT (the National Institute for Statistics in Italy) investigates, on the offer side, the capacity of accommodation establishments which it carries out on an annual basis in order to quantify the facilities available. Despite the abundant statistical information on tourism, often at a local level, only the arrivals and overnight stays are represented. So there is definitely a gap between the tourist market in the data and the real market. We have tried to fill this gap as much as possible with a cross-sectional study of many sources analysed. The data were taken from the internet where possible or requested officially.

Arrivals and Earnings: Analysis from the Global to the Particular

International sources such as the UNWTO (2013c) show how tourism is an important sector in the world economy. Despite the economic crisis that has led to a "hit and run" tourism (with 4/5 tourists stayingin their own country: *domestic* or *internal tourists*), *international tourist* arrivals have in recent decades been a trend of positive development in all the major sub-areas into which traditionally large international areas are divided (Fig. 1).

The number of international tourist arrivals recorded worldwide in 2012 (in terms of overnight visitors) exceeded a billion for the first time in history (UNWTO, 2013c). The number of arrivals, according to the UNWTO forecasts (UNWTO, 2013b) could increase by 3.3% per year in the period 2010-2030.

According to this projection of growth, it is expected that international arrivals worldwide will reach 1.4 billion by 2020 and 1.8 billion by 2030. In this global context it is interesting to note that between 2000 and 2011 Mediterranean Europe (which includes Greece, Italy, Spain, Portugal and Turkey) has overtaken Western Europe (Germany, the Netherlands, Austria and France) both in terms of the number of visitors (Fig. 1) and in increment, defined as the average annual percentage change in the international arrivals. Trend confirmed until the end of 2012 (UNWTO, 2013c).

Within Southern Europe, Italy is second only to Spain in terms of international and domestic arrivals (UNWTO, 2013d). Also in the world framework, Italy is among the top 10 Nations both regarding arrivals (UNWTO, 2013c) and profit (UNWTO, 2013a).

It seems clear that, despite the effects of the economic crisis having a consequent increase in domestic tourism, the turnover related to international tourism remains high and that the greatest gain is not directly linked only to a greater number of visitors

It is interesting to ask who the travellers who spend more are. In a world ranking, the countries that spent more in international tourism are China (102 billion dollars in 2012), followed by Germany and the United States (about 83 billion), although there is a greater increase of the Chinese (UNWTO, 2013c). In this ranking, however, the Italians are tenth, spending 26.4 billion (US $) in 2012 (UNWTO, 2013c).

UNWTO sources (UNWTO, 2013c) show that the increased spending is often directly related to the number of nights that visitors remain in accomodation establishments and therefore their average stay.

These data are important in the context of an initial marketing plan because they enable us to programme the correct type of offer.

To compare trends in the world tourism scenario with the current Italian one, it is important to refer to the national statistical data collected by the ISTAT. These data, as part of an investigation into the "movement of customers in hotels," referring to 2012 in Italy (ISTAT, 2013a) indicate 103.7 million national and international arrivals with 381 million nights spent in accommodation establishments, and then an average stay (ratio between the length of stay and arrivals) of about 3.7 days (Fig.2).

It is interesting to note a marked contrast to these trends: an increase in arrivals but a decline in the average length of stay which corresponds to a decrease in the number of nights that tourists spent.

The Non-resident (Foreign) Component in Italy

In terms of arrivals, the Chinese citizens in Italy are virtually absent as tourists despite China having become one of the world's major sources of outbound tourism (ISTAT, 2013b).

Within Italian provinces, according to the latest available data, the foreign arrivals are concentrated between Rome and Venice, while the Province of Naples is seventh (ISTAT, 2013b).

Analyzing in detail the distribution of international tourism in Campania from the most recent data available, we note that the major issuing countries are the United States followed by the UK, Germany and France (ISTAT, 2013b).

In economic terms, thanks to international tourism only, the province of Naples is the one that most stands out, having proceeds of €1,014 million in 2012 (EPT Napoli, 2013).

As for the Italian and foreign tourists in Campania, the most recent data available shows an increase from 2010, though the resident component is characterised by a greater number of arrivals (ISTAT, 2010, 2011, 2012, 2013c).

From the latest available data on the distribution of Italian and foreign arrivals in the different provinces of Campania, it is clear that most of the tourists travel to the province of Naples, followed by that of Salerno (Fig. 3).

In the province of Naples alone, as in the whole nation (ISTAT, 2013a), there is a seasonal pattern from which, by calculating monthly averages for the period 2008-2012, with an increase in domestic and foreign arrivals from spring to autumn, with peak attendance differentiated in August for Italians and September to foreigners (EPT Napoli, 2013). The average length of stay, on the other hand, has instead less significant seasonal variations while showing a peak in August (EPT Napoli, 2013).

The city of Naples is in the province that historically attracts a large portion of the Italian arrivals, followed only by the island of Ischia (EPT Napoli, 2013). The latter is however characterised by an average length of stay significantly higher (about double) than the other municipalities in the province. Considering the proportion of foreigners, it stands out that the City of Sorrento enters powerfully in the ranking of arrivals, contending for second place with the island of Ischia (EPT Napoli, 2013). The latter remains distinctly first in terms of average length of stay and also with the proportion of foreigners (EPT Napoli, 2013).

In the city of Naples visitors from Japan and the United States represent an important fraction of international tourism followed by those from France, the UK and Germany (Fig. 4), in slight contrast with the rest of the region (ISTAT, 2013b), in which Japan was only the fourth country. This suggests that Japanese tourists are mainly interested in the city of Naples.

Cultural Tourism in Campania

Given the nature of the ROV tourist offer, it is interesting to study the flow of "cultural" visitors in Campania. Those tourists interested in museums, monuments and archeological areas have averaged 6.2 million per year from 2005 to 2013, with a drastic drop in 2008-2009 (Fig. 5). The decline was probably due to the combined effect of the waste crisis in Campania and the beginning of the stronger phase of the economic crisis, in agreement with the data on arrivals in Campania (ISTAT, 2010, 2011, 2012, 2013c) and more specifically in the province of Naples.

This type of tourism is mainly concentrated between March and October, with a significant peak in the spring months (Ministero del Beni Ambientali e Culturali, 2014).

Focusing on the cultural tourism of the single province of Naples, in the same period 2005-2013 there was an average of about 5 million visitors per year (Fig. 4.5), which represents about 80% of that of all Campania (Ministero del Beni Ambientali e Culturali, 2014).

Within cultural tourism, the two closest destinations from the point of view of the geographical and scientific relevance are the Vesuvius National Park, which includes the location of the crater, and the archeological sites of Pompeii and Ercolano, with wellknown linksto volcano history.

The flow of tourists attracted to these sites is considerable, ranging from the more than 2 million visitors in Pompeii to the hundreds of thousands who go to the excavations of Herculaneum and/or to the crater of Vesuvius (Figs. 6 and 7).

Visiting the ROV

Currently, despite the absence of targeted promotion and marketing, every year the museum area is visited by a large number of visitors: 11,000 spontaneous visits per year (average 2005-2013) - 13,398 recorded in 2013 (Fig. 8).

The distribution of visits throughout the year to the Historic site shows a clear increase between March and May (Trimarchi, 2013). The origin of visitors (Trimarchi, 2013) shows that:

- foreign visitors come mainly from France, UK and Germany, followed by United States to a lesser extent (Fig. 9), according to the historical record of presences for the entire province of Naples (EPT Napoli, 2013);
- non-Italian resident visitors to Campania come mainly from Lazio, followed by Basilicata and Puglia (Fig. 10);
- visitors from Campania, who represent the vast majority of the total, come mainly from the province of Naples and to a lesser extent from Caserta and Salerno (Trimarchi, 2013);

Visitors are mainly students from junior and senior high schools, followed by groups and individual visitors (Trimarchi, 2013). The strong presence of schools is reflected in the distribution of monthly visits (Trimarchi, 2013), coinciding with the period between

March and May in which school trips are concentrated.

In this way, the application to the field of cultural heritage of the new forms of participatory communication and multimedia is an opportunity to ensure "the transformation of cultural institutions into open platforms for dissemination, exchange and value production, which can allow active communication with their audience, and the use of cultural heritage without geographical boundaries and looking to a future in which the sharing and open access models will keep on growing”.

Finally, in agreement with the authors of "digital invasions", we believe that the Arts and Cultural Heritage in general become knowledge when they succeed in being shared.

Conclusions

By combining the information obtained it was possible to design a comprehensive framework useful for a *good tourist offer* through the development of *dissemination*, *promotion* and *marketing*.

Despite the global (economical and political) and local (waste crisis in Naples) crises, tourism is still a very important sector in the economy: the turnover linked to both national and international tourism remains high. The gain is not only directly related to the number of visitors but also to their average expenditure: the countries that spend more on international tourism are China, followed by Germany and the United States. Two of these countries (Germany and the USA) are among the major sources of foreign tourism in Italy, as in the province of Naples. Nevertheless, it must be said that there has been a decline of German tourists, which from data, which remains unofficial, appears to have been offset by an increase in those coming from Russia. In economic terms, thanks to international tourism alone Campania has earned 1,419 million € in 2012. In particular, the province of Naples is the one which stands out the most with an income of 1,014 million € in 2012. The city of Naples, in contrast to the province and the region, is most popular with tourists from Japan.

The artistic and cultural tourism in Campania, both domestically and internationally, is particularly flourishing, and is driven by the artistic and historical sights of the region, such as Pompei, Ercolano and the museums of the city, especially Naples. The crater of Vesuvius itself, inserted into naturalistic and scientific paths, annually attracts hundreds of thousand of tourists. The two types of tourism (cultural and natural) must represent, for theirobvious cultural proximity and logistics, the main target in thefirst marketing plan that the ROV should seek. These data are important because they allow the programming of the correct type of offer, bearing in mind who the main tourists to reach are, i.e., who the visitors are who move the most and/or those who spend more on tourism.

In such a context, it is clear that, as the potential tourism development of the ROV is very high, than, with an appropriate marketing programme it must be considered that:

- the ROV is located on a road used by approximately 500,000 visitors a year who have paid the ticket to reach the crater;

- in the immediate proximity there are sites of very strong historical and cultural interest, such as Pompeii and Ercolano. In 2013 alone Pompei registered about 2.5 million tourists;
- the ROV, among others, represents an important element of the cultural heritage of the Vesuvian area, as a result of which it has recently been included among the History Sites of the *European Physical Society*.

It is therefore easy to understand that, with appropriate marketing strategies and a suitable socio-economic plan, it is possible to intercept a greater flow of tourists, diversifying the supply and distribution overthe months of the year. A similar operation must also develop proper ticketing (now the entrance is free), a dining/recreation ensemble, such as a bar and a bookshop. The need to set up proper policies and legal arrangements in order to develop a successful marketing strategy for achieving self-sustainability is fully recognised.

The communication strategy developed will not bypass new communication technologies (internet, social media and multimedia applications) or neglect the traditional media of dissemination and promotion, such as the press and television. There must be a synergy with the other cultural institutions, such as museums and archaeological sites, by inserting the cultural offer of the ROV into routes already established in Campania (e.g., the former Campania ArteCard).

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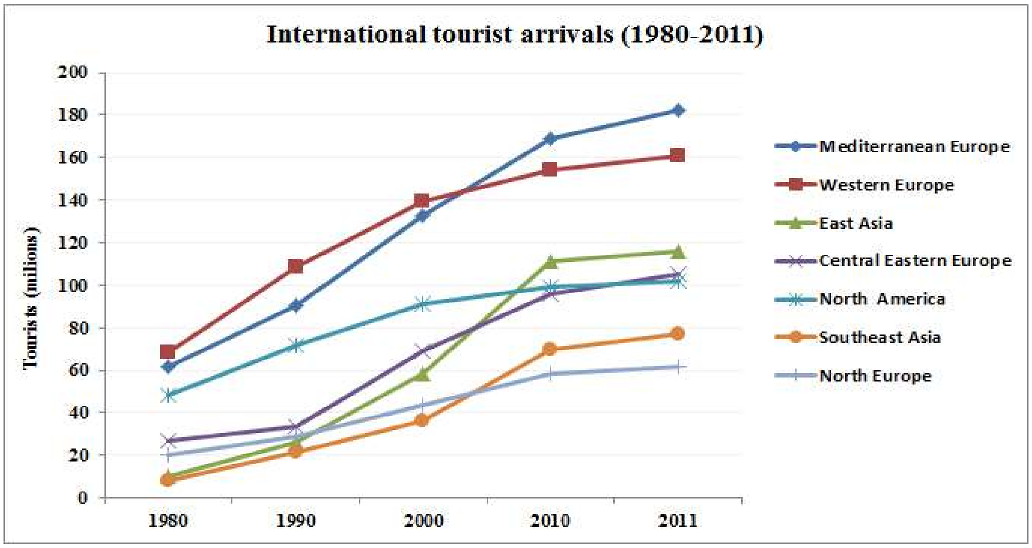

Figure 1. Number of international tourist arrivals (in millions) in the sub-areas, for the years indicated. Developed from the UNWTO source in "XVIII Report on Italian Tourism". Mediterranean Europe: Greece, Spain, Portugal, Turkey, Italy. Western Europe: Germany, the Netherlands, Austria, France. Central and Eastern Europe: Czech Republic, Hungary, Poland. Northern Europe: United Kingdom.

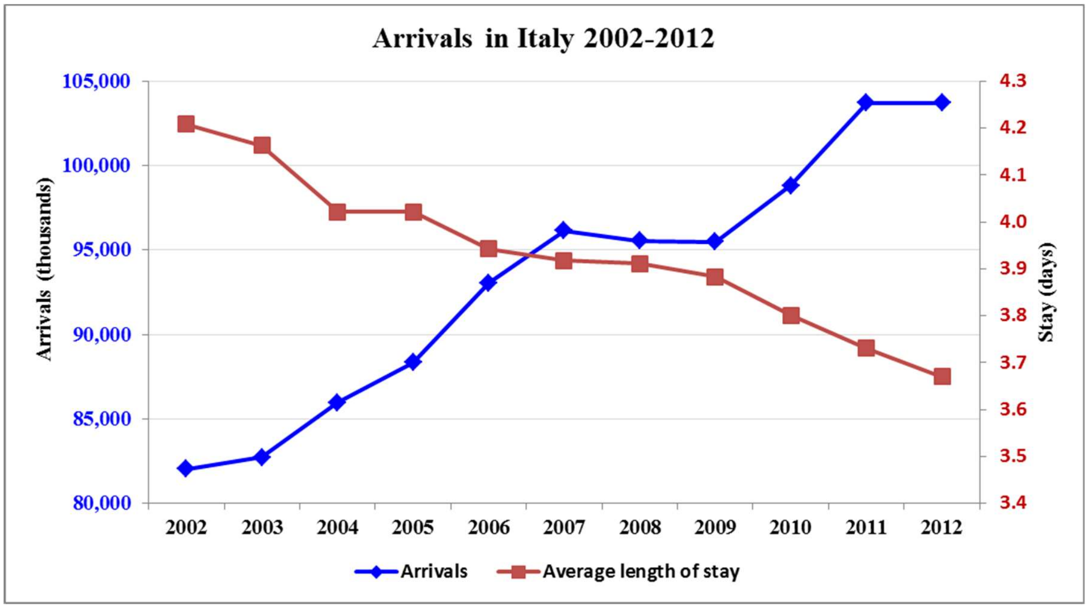

Figure 2. Arrivals and Average length of stay of domestic and international tourists in Italian accommodation establishments (hotel + complementary businesses) 2002-2012. Developedfrom ISTAT sources (2013a).

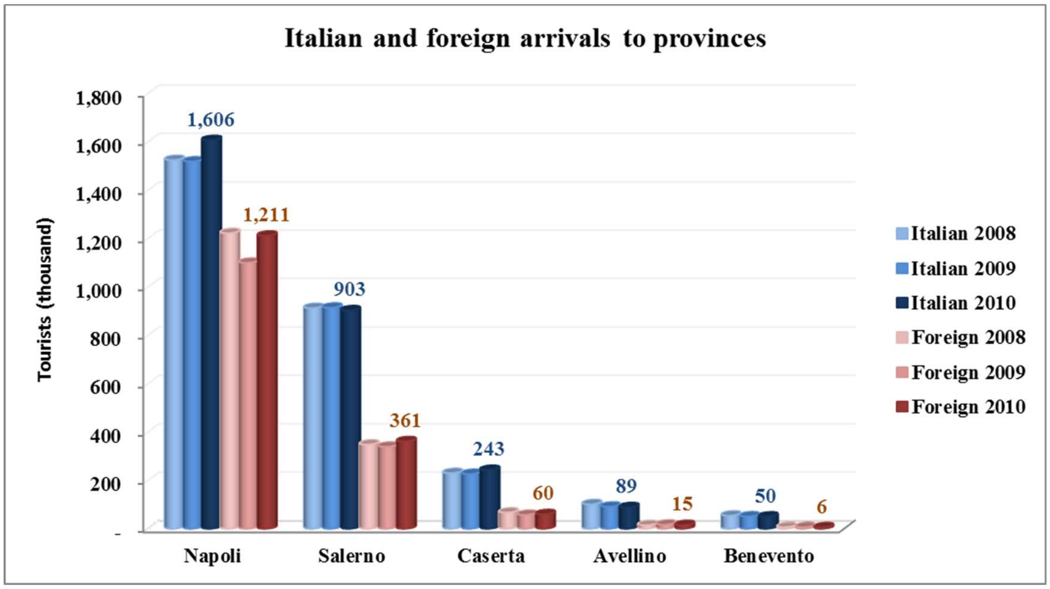

Figure 3. Italian and foreign tourist arrivals in the provinces of Campania in 2008-2010. The numbers on the histogram refer to the year 2010. Developed from ISTAT sources (ISTAT 2008, 2009, 2010b).

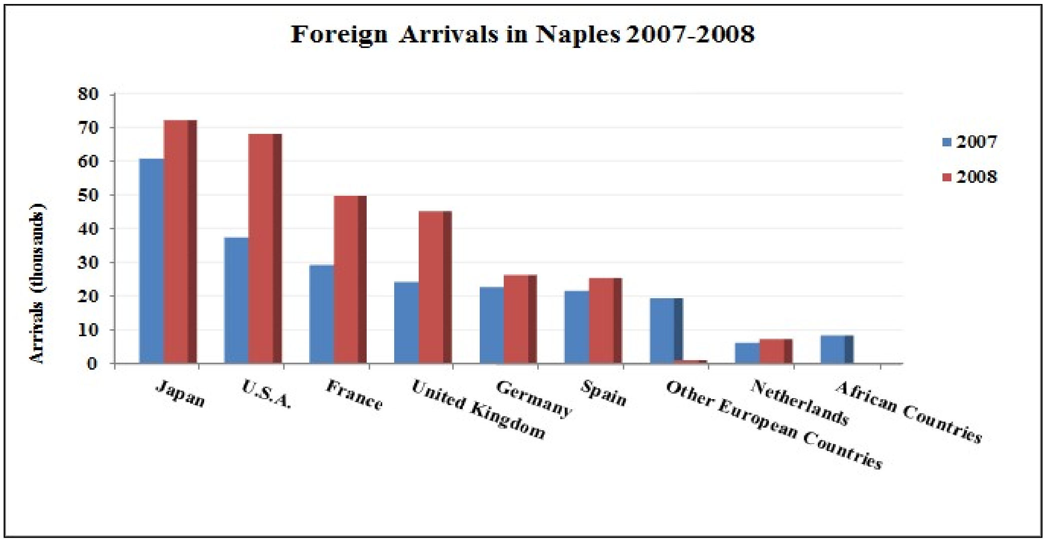

Figure 4. Foreign tourists arrivals accommodated in hotels in the city of Naples, by major nationalities of origin (EPT Napoli, 2013).

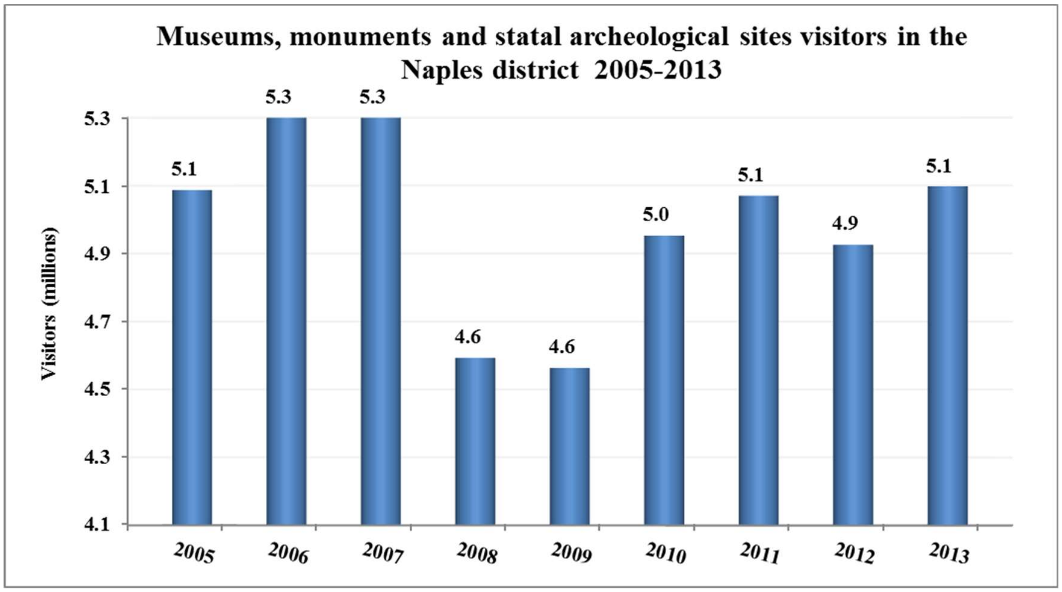

Figure 5. Flow of visitors to museums, monuments and national archeological areas of the Campania Region from 2005 to 2013 (Ministero del Beni Ambientali e Culturali, 2014).

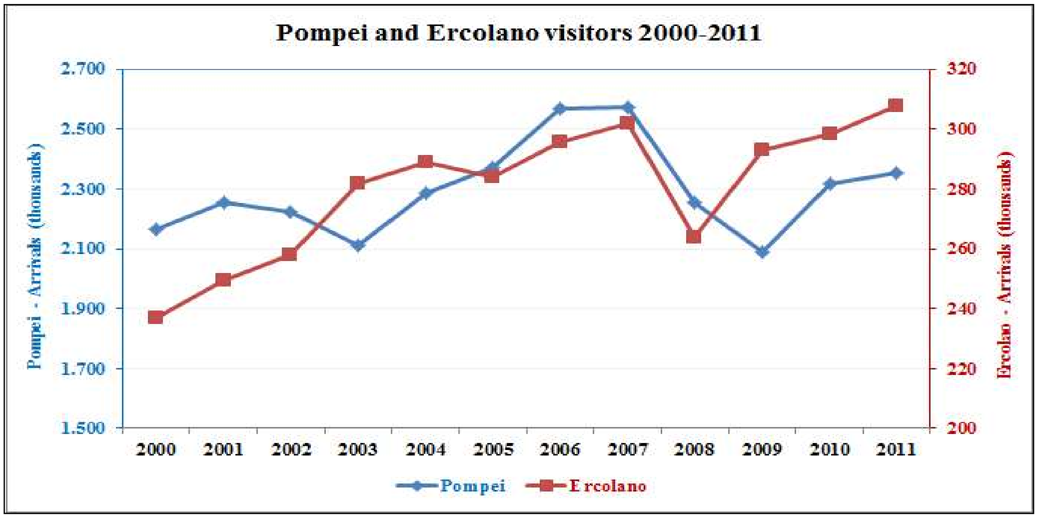

Figure 6. Streams of visitors to Pompei and Ercolano from 2000 to 2011 (Soprintendenza Speciale Beni Archeologici di Pompei, Ercolano e Stabia, 2013).

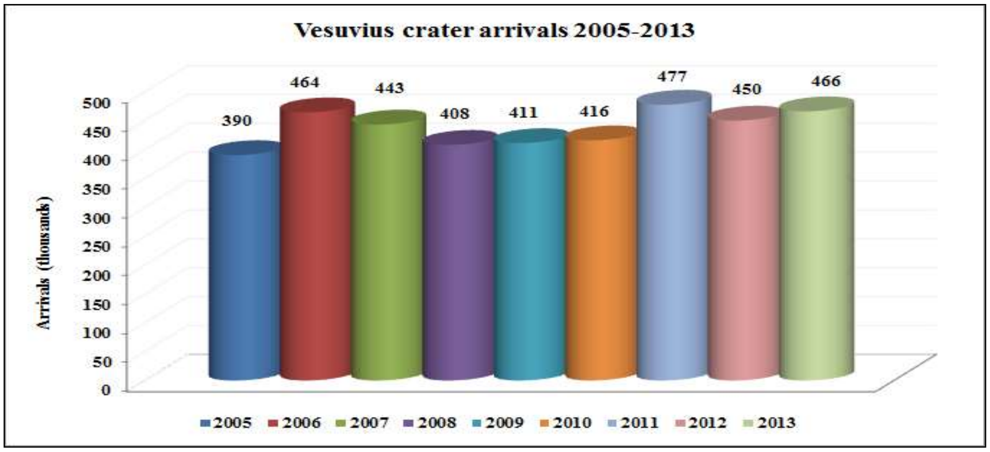

Figure 7. Streams of visitors to the Vesuvius crater 2005-2013 (Ente Nazionale Parco del Vesuvio, 2013).

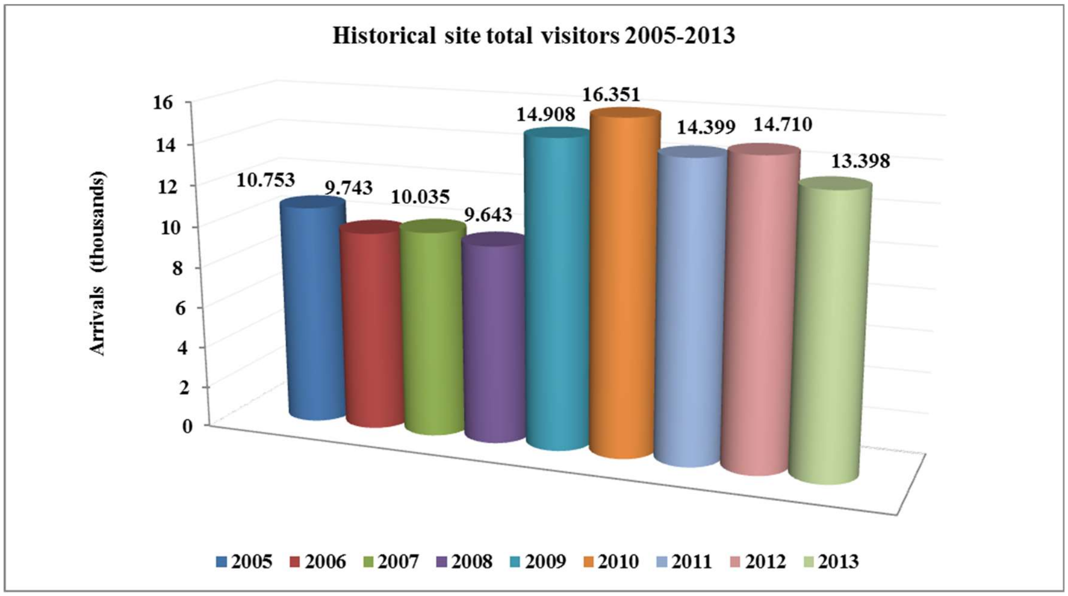

Figure 8. Annual distribution of visitors at the Historical Site of the Vesuvius-INGV 2005-2013 (De Lucia et al., 2010; Trimarchi, 2013).

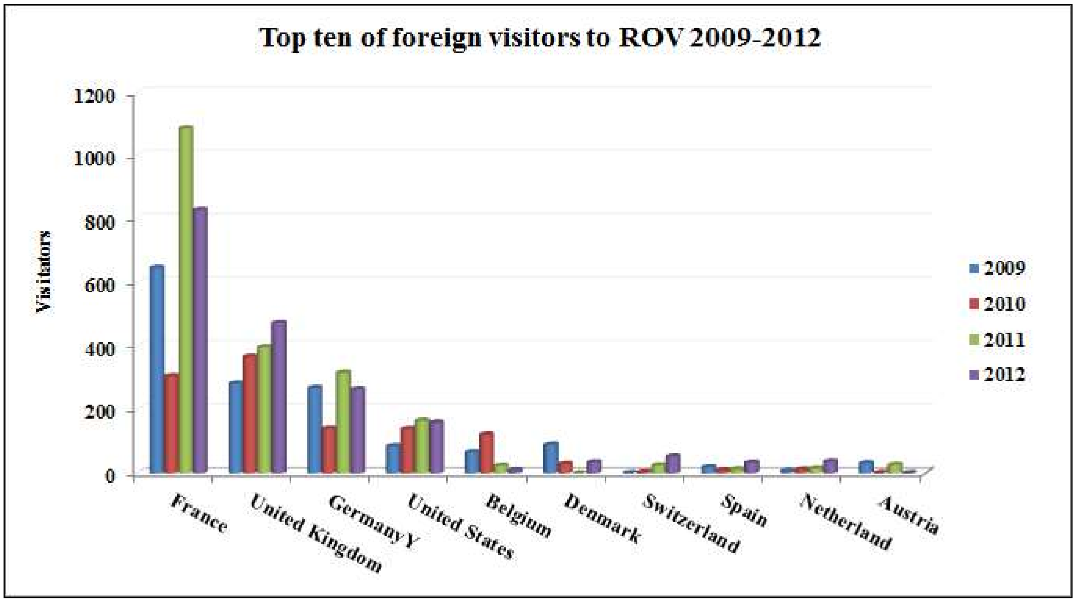

Figure 9. Distribution of visitors to the Historic Vesuvius Observatory Site -INGV 2009-2012 by country of origin (Trimarchi, 2013).

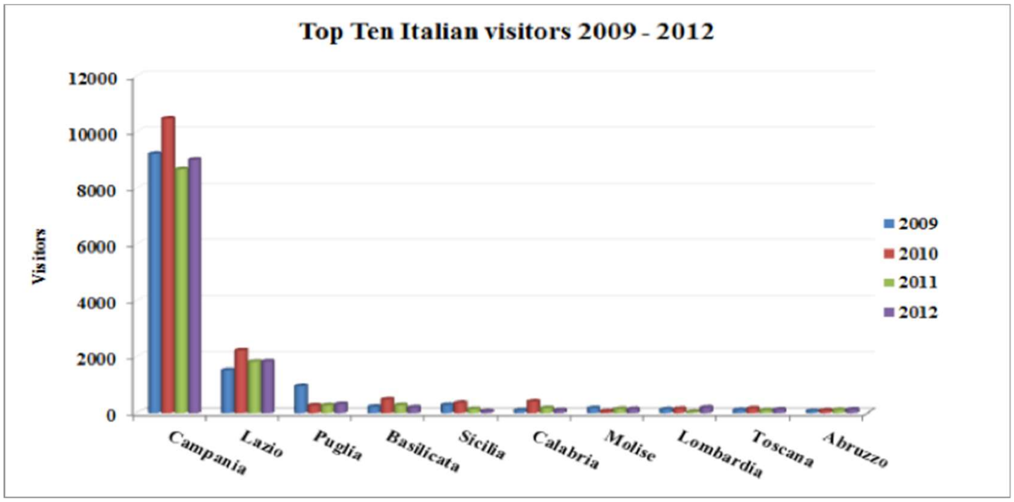

Figure 10. Distribution of visitors to the Historic Vesuvius Observatory Site-INGV 2009-2012 by region of origin (Trimarchi E., 2013).