Chinese tourism: a sustainable opportunity for local economies?

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Introduction

An increasing number of localities and regions in Italy are looking at the growing flows of tourists from China and especially at the "second phase" of this phenomenon (Arlt, 2011) as an important opportunity, both to sustain the industry's growth and to revitalize individual critical situations in specific localities[2]. The "Chinese option" is also attractive to the extent that it involves the possibility to be accompanied by Chinese investments in the tourist industry.

So far, various factors (including the limited amount of direct flights connecting Italy to China, the inefficient management of the visas, the cultural and operational shortcomings of national and regional promotion etc.) have severely limited the incoming flows, thus making the margins for future growth even more remarkable. However, also based on negative experiences with other BRIC countries (namely with the Russians), there is a growing perception that substantial flows of Chinese tourists will be sustainable only under specific conditions. On the other hand, the failure to set up an adequate destination management with an effective targeting on China would cause a deterioration of the Italian relative position in the world tourist market.

In the following paragraphs we report some early results of a project work on the issues raised by Chinese tourism growth in Italy and in particular in the Region of Tuscany. The first paragraph summarizes the nature and size of the phenomenon worldwide and with reference to Italy and Tuscany. The second paragraph defines the sustainability issues raised by the growth of Chinese tourists, a phenomenon that marks a discontinuity in the long and successful history of tourism in Tuscany. Furthermore we discuss some specific elements that have been identified as critical in the Chinese tourist experience in Tuscany. The third paragraph deals with the policy implications and raises the issue of governance in destination management.

The opportunities

Discontinuity and growth

The Chinese have always traveled within their country, which provides an unparalleled diversity of landscapes, local cultures and travel experiences. On the contrary, foreign countries were never a significant part of their traditional travel experience. The first decade of the millennium witnesses a change of historic importance: "About 70 percent of all outbound trips from China only happened within the last six years" (Arlt, 2011).

[2] E.g. in Italy a frequent reference to the Chinese opportunity is made for those thermal cities in deep crisis (Bellini and Loffredo, 2011)

In 2010 the arrivals of Chinese outbound tourists reached 57.4 million. This means an increase by 20.8% compared to 2009 and by 16.9% as yearly average in the period 2001-2010. China is now one of the top ten outbound tourism markets in the world and the fastest growing in Asia. 2009 was also the first year marked by an international trade deficit in tourism (i.e. with total consumption of Chinese tourists abroad being greater than China's international tourism income). Besides the obvious relationship with the spectacular overall economic growth, this has also been result of active promotional policies by the destination countries, an overall relaxation in visa policies, and the appreciation of the Renminbi. It is widely expected that the growth will continue in the next years, with Europe (and especially the countries sharing the Schengen visa system) remaining a favorite destination (Zhang, 2011). In 2012 it is expected an increase in Chinese outbound tourism of 12% or, according to a more optimistic view, the number of border crossings from mainland China to surpass 80 million[3].

Unsurprisingly, in many countries there is an increased attention about Chinese outbound tourism, as witnessed by the growing numbers of reports on trends and characters of Chinese tourism and, more importantly, by the fact that so many tourist destinations identify China as a top priority in targeting their marketing strategies.

Besides quantitative growth, a new era of Chinese tourism has clearly begun, where tourism becomes an integral part of the lifestyle not only of Chinese affluent classes, but also of larger social groups (the emerging middle-income class). A "new Chinese tourist" needs to be addressed:

"The 'New Chinese Tourists', knowledgeable, sophisticated, travel-savvy and predominantly below 45 years of age, are entering the scene. New Chinese tourists look for deeper experiences and closer contact with local host populations during their self-organized trips. Earlier they took photos of themselves in front of the Sydney Opera House or the Eiffel Tower, but are now drawn more to new places and activities. Freed of the commission-driven tour guide, they will purchase more goods for themselves and fewer for their friends and relatives back home, as their peers are more likely to travel internationally as well. New Chinese tourists offer an increased chance for destinations and tourism service providers off the beaten track to get a piece of the Chinese outbound market. They will have to make sure that their product is adapted to the special needs and expectations of this new kind of Chinese guest, that their staff are prepared to welcome global yet patriotic travelers and that they make their travel product attractive and prestigious to the customers through social media and other forms of 'WOM squared' (word of mouth and word of mouse) communication." (Arlt, 2011)

[3] COTRI Press Release, 9th February 2012

At the same time the growth of outbound tourism from Mainland China is accompanied by an important transformation. The tourist industry contributes to the re-balancing from the now overwhelmingly manufacturing economy to a more service-oriented economic structure (Zhang et al., 2011, p. 23 ff.). This is an important aspect because the growing outbound tourism will by no means controlled by foreign companies, both because of the regulatory limitations imposed by the Chinese authorities on foreign-owned travel agencies[4] and because the Chinese tourist industry is rapidly reaching the stage of maturity that could allow it to "follow" the outflows of Chinese tourists.

Chinese tourists in Italy and Tuscany

Italy, one of the most important tourist destinations in the world (with 96 million arrivals in 2010), has witnessed a remarkable resilience of this industry during the recent economic downturn. This performance was also due to successful growth of inbound flows from "BRIC" countries.

So far, however, according to the most recent official data (MAE-ENIT, 2012), Italy takes only a very small share of the overall flows of Chinese tourists traveling abroad (0.46% in 2009). Italy is only the fourth destination in Europe (after UK, Germany and France) but with a remarkably positive growth trend (+18% in 2009 compared to 2008). Dynamics is also revealed by the data concerning visas with a 49% growth of individual visas in 2010 (compared to 2009) and a 99,9% growth of group visa. On the negative side, there is the limited number of travel agents that operate on Italian destinations, none of which is specialized on specific destinations within the country. Another relevant negative factor is the limited number of direct flight connections between Italy and China, mostly managed by Chinese airlines (Air China and China Eastern).

If we consider the geographical distribution of these flows inside Italy, there is a clear concentration in four Regions (84%): Lazio (where the capital city of Rome is located), Lombardia (with Milano) and the two major tourist regions of Veneto and Tuscany, that host together almost 50% of Chinese visitors.

For Tuscany's tourism industry (11.4 million arrivals in 2010) China is now the fifth extra-European market after USA, Japan, Canada and Australia. However Italy and Tuscany show much more disappointing data when we look at the amount of average time of permanence within the country (and the region): 1.7 days for Italy, 1.5 days for Tuscany. The geographical concentration is noticeable: 63% of Chinese tourists stay in Florence. Other selected locations are art cities (Pisa and Siena) and cities with large Chinese communities (Prato) (Centro Studi Turistici, 2011).

[4] According to 2009 regulations, foreign travel agencies cannot deal with outbound tourism. Recently (August 2010), the Chinese National Tourism Administration (NTA) issued some "Tentative Measures for Supervising Pilot Operation of Outbound Tourism Business by Sino-foreign Equity Joint Venture Travel Agencies", that have innovated the rules by allowing the licensing of a small number of Sino-foreign equity joint ventures (Bordini, 2011).

According to a recent survey, Italy ranks 10th as "Must Visit Holiday Destination" for Chinese and 5th in Europe (after France, Switzerland, UK and Greece) (GfK Blue Moon 2012). Promotional programs suggest that the Italian and Tuscan tourist industry is especially focused on the top segments of the Chinese markets, i.e. the 960 thousand millionaires (with personal wealth of 10 million Yuan), 42% of which live in Eastern China. And these people rank Italy quite high (in 2011: 5.8%, 7th) as a preferred luxury travel destination (behind France, US, Australia, Japan, Maldives and Singapore and with percentages similar to Switzerland and Dubai[5]. Wealthy Chinese are not the only target, however.

Several segmentations of the Chinese outbound tourism market have been produced, based on socio-demographic characters, income and behavior. A less frequent reference is made to geographical variables, missing the differences in the level of travel experience between the main coastal cities and other areas[6]. (This of course reflects the focus on the highest income segments, that are – as said before – geographically concentrated in the Eastern cities.)[7] the following segmentation is drawn from the MAE-ENIT (2012) report and is a good summary of the state-of-the-art:

TARGET	NOTES
Businessmen / professionals	Higher income, higher (college-level) education. Age: 30-50. High propensity to travel. Main motivations for traveling abroad: leisure, high-level shopping, culture. Arrival in Italy by flight. Preferred means of transportation within the country for group travel: bus, but increasingly also "fly&drive". Preferred destinations: art cities with shopping. For higher income segments: resorts and exclusive destinations. Preferred lodging: 5-stars and luxury hotels; 4-stars hotels Preferred timing: February and October (in coincidence with main festivities) and school holidays. Individual travellers with business activity are less concentrated. Information sources: from within his/her own social group, specialized press, luxury magazines, tourist agencies Purchasing through tour operators and agencies, with slow increase of (partial) self-organization based on independently acquired information (internet)
Family groups / families with small	"White collars" from major cities and two income sources. Mostly college-level education. Age: 30-40 (parents of the families with small children), but groups may

[5] Sources: http://www.hurun.net/usen/NewsShow.aspx?nid=117 and http://www.hurun.net/hurun/listreleaseen548.aspx
[6] A different approach can be seen in GfK Blue Moon 2012, distinguishing three groups of cities.
[7] More recently a greater attention to geographical differentiation seems to emerge in the Italian practice. The Progetto "TRAVEL", e.g., involves four Italian regions (Marche, Puglia, Veneto, Tuscany) targeting three Chinese provinces (Jiangsu, Hunan, Guangdong), within a Foreign Ministry framework program (www.programmaregionicina.it).

children	include elderly persons. High propensity to travel. Motivations: leisure, high level shopping, culture. Arrival in Italy by flight. Transportation within the country by bus. Preferred destinations: art cities with shopping, depending on the catalogues of tour operators. Sensitive to price, hotel and service quality. Preferred lodging: 4-stars hotels. Preferred timing: February and October (in coincidence with main festivities) and school holidays. Information sources: tour operators, web Choices are influenced by the possibilities offered in the catalogues of Chinese tour operators. Partial self-organization and use of online travel agents (like C-Trip) is slowly growing.
Childless couples / singles	"White collars" from major cities and two income sources. Mostly college-level education. Age: 25-40. High propensity to travel. Motivations: leisure, high level shopping, culture. Arrival in Italy by flight. Transportation within the country by bus or, to a lesser extent, domestic flights and "fly&drive" solutions. Preferred destinations: art cities with shopping. They are interested also to new and alternative destinations. Choices are determined by price and quality of the hotels. Highly sensitive to place brands and leisure image of the specific localities. Preferred lodging: 5- and 4-stars hotels. Preferred timing: February and October (in coincidence with main festivities). Information sources: internet. Purchasing through tour operators. Slow growth of partial self-organization. This is the social group that feeds the growth of individual and "free and independent" travelling.
Seniors	Besides those that are part of a family group, seniors travel both individually and as part of group or as couple. Main motivation: culture. Among leisure elements a special attention is paid to food quality. Mostly flight + bus package. Preferred destination: art cities with shopping. A slowly growing interest for new destinations. Choice is determined by price, cultural expectations. Preferred lodging: 4-stars hotels. Preferred timing: February and October (in

	coincidence with main festivities). Information sources: internet. Purchasing through tour operators. Slow growth of partial self-organization.
Youth / students	"Long haul" young travellers mostly belong to higher income families, providing financial support. Otherwise they belong to the growing flows related to cultural and university exchanges. College-level education. Age: 20-30. Very high propensity to travel. Destinations are art cities and university cities, but with great interest for alternative destinations. Choices are determined by price and quality of hotels (with the exception of students). High perception of the local place brands. Preferred lodging: 3- and 4-stars hotels. Information sources: internet. Purchasing though tour operators, but increasing self-organization.

The challenges

The sustainability issue

Italy and Tuscany are tourist destinations whose image has been shaped over a long period of time by a highly internationalized tourism. Still today (2010) 48,8% of tourism in Tuscany originates from foreign countries, out of which – however – 74% from European countries. In other words the very high profile of a region like Tuscany is deeply rooted in Western culture. Northern European (and American) literature and movies have contributed to built the highly recognizable (and now often stereotypical) images of the Region. In British and American literature (as also reminded by movies such as "A Room with a View", "The English Patient" and "Stealing Beauty") Tuscany is a sort of exotic dreamland.

Therefore, with the possible exception of Brazil (whose cultural and ethnic ties with Italy are robust), the growth of BRIC tourism marks a clear discontinuity. As cross-cultural studies have shown, "the largest differences among cultural groups are between Asian and Western cultures" (Reisinger 2009, 242). It is therefore the first time that the "psychic distance"[8] between the tourist destination and the market is challenging the consolidated compromise between local heritage and Western culture on which the global brand of Tuscany has rested and the unique "authenticity" of the Tuscan experience has been defined: a

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[8] We refer to this concept as an extension of its use within the so-called Uppsala internationalization model. Psychic distance is defined as "the sums of the factors preventing the flow of information from and to the market. These include differences in language, education, business practice, culture and industrial development" (Johanson and Vahlne 1977, 24).

blend of “original” and “exceptional” authenticity with an element of perceived “natural” authenticity (even if deceptive, due to the strongly “cultural” character of the Tuscan landscape, being the result of centuries-long manipulations: Gilmore and Pine, 2007; Bellini et al., 2010). With the (B)RIC a new and substantial effort has to be made to bridge the serious gap between destination and tourists, in order both to explain (and educate?) the newcomers to the sense of Tuscan beauty and to really understand their needs and motivations. Needless to say, bridging this gap is made more difficult by the complexity of the tourist business “involving a multitude a decisions related to the purchase and consumption of a variety of goods as well of services” (Manrai and Manrai 2011, 28), most of which are deeply influenced by culture-related factors.

The novelty of the challenge justifies, in our view, that an issue of sustainability is raised. Some negative experiences with Russian tourists provide sufficient warning in this respect. Their “invasion” of the most prestigious areas of the Tuscan coast (first, Versilia, and especially the glamorous city of Forte dei Marmi; later, Castiglione della Pescaia in southern Tuscany) was hailed as a decisive contribution to successful local economies and promptly supported by promotional actions. It did not take much time to realize that this success story had its dark sides. Due to the Russians tycoons’ preference for buying or renting villas, real estate prices have skyrocketed and so did also many tourism-related services, whose price increases were fuelled not only by adding quality and luxury, but also in order to express and guarantee exclusivity. At the same time, news often reported negative reactions to the ostentatious and arrogant high-spending behavior of these *nouveaux riches*, both by locals and by traditional customer base.

The Russian example clearly recalls a piece of basic wisdom of service marketing, warning that the positive and negative interactions of different kind of customers of the same service contribute decisively to define quality perceptions (Grove and Fisk 1997). It is therefore important to be aware of the potential local impact of the “tourist culture”. By this we mean that tourist behavior, especially when in groups, is a function of both the national “home” culture and of a temporary set of roles, rules, notions, expectations, processes etc., that tend to transform the ordinary person into a new one, with a new, “deviant” identity shaped by his/her quest for the unusual, escaping from routine life (Jafari 1987).

Experienced hotel managers from Thailand report that the Chinese

“want lively, louder environments where they can shop for Louis Vuitton and Gucci bags and eat in large groups, while European visitors prefer a more tranquil, quiet, back-to-nature kind of experience. When too many Chinese, Indians, and Russians come and we cater to them by opening shopping centers or set up large group tables, we see a clash with what the Europeans want. The Europeans leave and look for other

quieter hotels, or different locations altogether. For instance, we have seen more Europeans leaving Phuket and going to Khao Lak and Krabi and other more peaceful areas" (Rein 2012).

It is also reported that international hotel chains, like Accor and the Intercontinental Group, are planning to open, first in China and later abroad, hotels under a new made-for-China brand in order to accommodate Chinese travelers, with Chinese features like private dining rooms, cut bar spaces, Chinese dishes etc. (Rein 2012; Wassener 2012).

Dealing with the Chinese tourist, before and during the travel

In analyzing the how cultural and practical factors impact on tourist behavior and how Tuscans (and Italians) seem able (or unable) to interact, we focus on two main phases (cf. Manrai and Manrai 2011).

In the ***pre-travel*** stage, a variety of interacting factors impact on the fundamental decision about the "where" and "how" of trip (cf. Hung and Petrick, 2012). In particular, depending on the stage on the travel life cycle (Oppermann 1995), Chinese tourists have to decide the preferred mode of the travel: group vs. individual. Normally the likelihood to choose the individual option increases in case of return trips and therefore it is expected to become increasingly important in the future.

They also experience a number of practical demand constraints. A major concern is about security and unethical practices (Luo, 2011; Zhong et al., 2011; Keating, 2009). Considerations about their travel budget are of course important, especially for middle-class travellers. Also important and peculiar are the constraints regarding seasonality, with the strong concentration on very specific and compressed moments of the year, at the time of the most important public holidays (the "golden weeks"). Price-quality relationship and time management are key variables for the "where" and "how" decisions of the potential outbound traveller and require to be addressed by destination marketers with great awareness.

Getting a passport is an increasingly easy task for the prospective Chinese traveller. Getting the visa could be a more stressful and discouraging step. This is an especially serious problem for Italy. Due to Schengen agreements (and to the special attractiveness, that Schengen countries have for Chinese tourists, allowing for a differentiated travel experience in more than one European country), there is a de facto competition based on the smoothness of the visa-issuing process. In fact, the slowness and complexity of Italian consular bureaucracy (added to the greater supply of flights by the dominant carriers, i.e. Air France – KLM and Lufthansa) is an incentive to choose non-Italian airports to access Europe and therefore to spend less time in Italy.

Chinese tourists are eager to get information about their destinations, by using a variety of tools and increasingly by navigating Internet. The latter is very relevant in allowing to overcome cultural, knowledge and information constraints that are still existing (Li et al, 2011). Television programs are also very influential information sources (Sparks and Pan 2009).

This search stage is key in the formation of expectations (including perceptions of travel risks). During this search updated and specific information is mixed to the previous knowledge about the location. Italy has certainly a place in the imagery of the educated Chinese. Such place is linked to history (a civilization "as old as ours"), the beauty of landscape and the arts, such as music or cinema. Italy is often associated with opera and a few popular singers (Pavarotti, Bocelli…) and the location of some successful movies also contributes to raise interest and curiosity to visit them[9]. Differences within Italy are less commonly perceived and therefore regional images are not so distinctive or, when celebrated like in the case of Tuscany, roughly superimposed to the national image.

A powerful association with Italy regards football. The knowledge about the most important teams is surprisingly diffused and detailed and many Chinese would define themselves as supporters of an Italian team.

Equally powerful is the association with luxury and fashion. Both wealthy and middle-class Chinese perceive the ownership of a piece with a celebrated Italian brand as a status symbol. Of course, differences in income may imply different degrees of realization, from wearing Prada shoes up to driving a Ferrari.

Tourist marketing communication builds on such premises, but with mixed results. Only a limited number of websites[10], e.g., are published with Chinese language pages, as if Chinese customers were expected to get along with English. In some cases the Chinese page is made up with titles in Chinese and text in English or even Italian (e.g.: www.in-tuscany.it or www.turismo-marche.com or www.pompeiturismo.it). In other cases the Chinese page is a mere translation of the Italian or English and provides reduced information, compared to the pages written in the main languages (e.g., www.montecatini.turismo.toscana.it). Sometimes also the quality of the Chinese language is mediocre. There are only limited cases of websites designed for the Chinese audience, like the official Italian portal (http://www.yidalinihao.com) or the independent portal www.meilideyidali.cn. One excellent case is the Venice website (www.veniceconnected.com), whose Chinese page, thanks to the cooperation of the local university (one of

[9] Interesting perspectives are linked to film locations also today: in cooperation with the Toscana Film Commission, Lucca and its surroundings have been chosen as the location of some episodes of a fiction, entitled "The China Story", a major TV-movie production by the first channel of the Chinese state television (CCTV-1) with a forecasted audience of one billion viewers!

[10] These are preliminary results from a database of Italian tourist websites (mostly from Tuscany and from the other regions with greater Chinese presence and/or participating to the "progetto TRAVEL" of the Italian Foreign Ministry (see note 7 for details). Reference to the websites is made on the basis of a visit performed in February – March 2012.

the most prestigious in the country for the teaching of Oriental languages), has been re-designed to meet the needs and styles of web communication in China.

Overall the contents reflect very traditional messages on art, landscape and food. In several cases the link with the fashion and luxury industry is convincingly developed. The link with football is ignored. The modern dimensions, like contemporary architecture, scientific research and higher education (notwithstanding the increasing number of Chinese students in Italian universities) are equally forgotten.

Also no attempt has been made to work on the Chinese transliteration of names, an issue well known in international marketing literature. "Creative" translations of famous Western brands, like HP or Carrefour, have proved to be relevant in introducing a brand to the Chinese audience, because they add positive meanings[11]. This may also happen in place marketing. Firenze is commonly called "Foluolunsa", a quite clumsy phonetic translation of the English version "Florence". Yet, in one famous Chinese poem by Xu Zhimo (1895 – 1931), entitled "A Night in Florence", the name of the city is "Feilengcui", with a charming and intriguing meaning (Cold Jade) (Luo, 2011).

In the ***during-travel*** stage the travel experience takes place. Many cultural and non-cultural factors influence this experience. In the case of Chinese tourists this happens, e.g., with respect to the way they deal with "novelty" (a dominant element for Chinese first-time travellers, eager to experience difference to their home environment) and to the way they develop their "temporary tourist culture" (Jafari 1987; cf. GfK Blue Moon 2012). These are all critical elements that can be influenced by an appropriate inter-cultural approach.

A key issue in the Chinese travel experience in Italy is the short stay in each location. A mix of cultural and practical motivations causes the tendency to increase the number of destinations to visit while in Europe. This is perceived like a way to best exploit the opportunity to be in Europe and getting the highest value for the money spent, even at the cost of renouncing to a good deal of relaxation. Of course, here there is a serious contradiction with what is usually identified as a distinctive element of the Tuscany travel experience: the quality of slow life.

The total absence of one-destination packages is however no longer true. Slowly a demand emerges for at least reducing the number of countries and locations visited, allowing for some time to relax. Chinese

[11] Hewlett-Packard - HP is named "Hui Pu" (pronounced "hway poo"), with "Hui" meaning favor, kindness, or in terms of prices, inexpensive or a good value, and "Pu" means general or universal. Therefore the name suggests benefit and good value for all. Carrefour's Chinese trademark is "Jia Le Fu". The three characters mean "family, joy and good fortune".

travellers, especially when coming from a large metropolis, start appreciating slow life. This new attitude is strategic for a sound development of Chinese tourism in Tuscany. Paradoxically this gradual conversion finds an obstacle in the lack of flexibility by Tuscany's *agriturismi*, accustomed to sell week-based packages instead of the two-three nights requested by the Chinese visitors, willing to experiment countryside life during their European tour.

The during-travel experience requires the most careful exercises in inter-cultural dialogue. Cultural differences develop from different value systems, patterns of social behavior, verbal and non-verbal communications, that may cause misunderstandings. They are not all easily understood on the basis of some generic international experience, but require prolonged exposure to the other culture (Reisinger, 2009). With the Chinese, e.g., the unsaid is often more important than what is said. In dealing with them it is often necessary to balance the Chinese sensitiveness to being discriminated (Chinese tourists have curiosity about the Western countries, but surely no inferiority complex) and their reluctance to make their requests in a way that could be perceived as arrogant and un-harmonious. It is therefore essential to understand both what the Chinese tourists ask and what they *do not* ask explicitly (Luo, 2001).

Potential embarrassment and inconvenience can be created by apparently small details, like the availability of warm water in the rooms (or of a simple boiler) or the understanding of their difficulties in eating rare-cooked steaks or cheese and in getting along with cold breakfast. The ability to provide good compromises between the rigid rules of Italian cuisine and the needs deriving from the traditional Chinese way of eating is a significant test. Part of the show of respect for the Chinese guests, that is too often lacking, has to do with the availability of documentation, signs, instructions, TV channels etc. in the Chinese language. The assumption that Chinese "must" read and speak English is totally unrealistic, and yet still widespread.

During the travel, tourists' satisfaction is made possible by meeting or exceeding their expectations. The way expectations are formed may cause problems: e.g. the expectation that hotels in Europe should be similar to the "Western hotels" in China, and therefore negative perceptions attached to old-style hotels, small rooms, inferior services etc. Partially these problems should be faced by appropriate communication in the pre-travel phase. Earlier on, we already emphasized the shortcomings of websites. The situation is made worse by the role of foreign tour operators, who are planning the trip and play the role of cultural intermediaries along standardized criteria. Unsurprisingly the Chinese tourists end up as being passive receivers of the most stereotypical images of the region (and of the country), of overwhelmingly artistic and historic information (sometimes without much meaning to them), of un-distinctive shopping etc. As a matter of fact, Tuscany's actors are not in control of the constituent elements of the travel experience of

Chinese tourists, which means that they are neither responsible for nor in charge of the cultural mediations between destination and tourists (Rossi and Goetz 2011).

Policy implications: a governance issue

For local policy makers meeting these challenges requires, first of all, awareness. In Tuscany, like elsewhere, a dangerously undefined myth of the coming wave of Chinese tourists is sometimes presented as a windfall opportunity rather as a substantial discontinuity in the history of the tourism industry. In a Region, where the exceptional fame of natural resources and historic heritage makes attracting tourists "too easy", the weakness of the processes of strategic thinking and collective action may result in a vicious circle of failures: disrupting the delicate balance between tourist experience and local identity would mean missing the opportunities and weaken the relative competitive position of the Tuscan tourism industry.

Secondly, an appropriate approach is required.

A large body of literature has dealt with the "whys" of travel and has identified push factors, i.e. internally generated drives, and pull factors, that are related to the attractiveness of the destination. Knowing the motivations is considered instrumental to predicting tourists' behavior and therefore set up effective marketing to attract them (Ah and Pei, 2005). A positive interaction between push and pull factors produces congruity between the tourists' self-image and the destination image. In other words, the better the matching between a destination's (perceived) image and the tourist's (perceived) self-concept, the greater the tendency for the tourist to choose to visit that place and, after the travel, to feel satisfaction with the experience (Chon 1992; Goh and Litvin 2000; Beerli et al. 2007; cf. also Usakli and Baloglu 2011 and Sirgy and Johar 1999). However, when the psychic distance between destination and prospective tourist is large, all this cannot happen as a simple market interaction, even if facilitated by traditional promotional tools.

The challenging task is to design a Tuscan experience (or rather: a range of Tuscan experiences) that is at the same time tailored on the self-image(s) of the Chinese and that does not clash with the constructed Tuscan "authenticity", which is the result of the long history of interactions between local culture and inbound tourists. The amount of knowledge resources that have to be brought into play is impressive and clearly is not available freely on the market nor the autonomous acquisition by companies can be simply subsidized by some sectoral policy.

Rather, this appears to be a field where a policy network approach is required, pooling knowledge resources and relational assets for the common policy purpose[12]. Considering the intelligence of "push factors", the involvement of those local actors (like universities or manufacturing companies) that have a significant asset of experiential knowledge with China should be certainly considered. This is also useful to link tourism to other dimensions of the international relations of an area. There are often unexplored links, e.g., between tourism and the internationalization of the higher education systems or of the economy. Chinese students in Tuscany feedback personalized and credible information to their families and friends, while, at the same time, tourists, that would receive a positive, multi-faceted view of Tuscany, may consider it as destination also for the studies abroad of their children. Companies working in or with China may convey images and information about the region (and in a very concrete way, when their partners visit their facilities in Tuscany), while a perception of Tuscany as being much more than an open-air museum would make it an interesting option for Chinese investments.

Considering "pull factors", destination branding requires more than ever the ability to avoid selling postcard representations of the territory and to re-interpret the consolidated assets of an area, by accepting (and controlling) a certain degree of contamination (between local and global, ancient and contemporary, tradition and innovation). On the one hand, this requires investing in education at all levels: "cross-cultural education is the only way to get ahead in the world today in order to avoid and/or reduce tensions and build mutual understanding among countries with different cultural values" (Reisinger 2009, 242).

On the other hand, this cannot happen within a technocratic vision of territorial marketing, where branding, communication and strategies are left to the creative contributions of distant consultants. The cultural adaptations that are required in order to provide the new tourists with a credible and understandable "authenticity" must be shared by more than the local industry and should be a collective acquisition, as they have to be convincing and acceptable also for the "internal market" made of residents and other tourists. In essence, the re-branding of the destination must be considered, planned and realized as an innovative social construct (cf. Dioguardi 2009, Keating 2009 and Jurowski 2011).

Lastly, all previous arguments in the Italian and Tuscan case converge to emphasize the issue of who controls the planning and management of the Chinese travel experiences in Italy. The greater the sensitivity of cultural issues, the more important it would appear that cultural mediations are not managed by others. The weakness of the Italian tourist industry (like the absence of important hotel chains, the lack of a major

[12] Policy networks are defined as "(more or less) stable patterns of social relations between interdependent actors, which take shape around policy problems and/or policy programmes" (Kickert et al., 1997)

international airline, the foreign dominance in the travel agency sector and therefore the need to rely on complex consortia of small companies with weak public guidance) justifies pessimism in this respect.

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