ABSTRACT

In this study, taking as starting point some estimates published by official institutes on hidden tourism in Italy and in Sicily, we reflect on the meaning and on possible kinds of hidden tourism and suggest a research methodology direct to its estimation. Particularly, we present the research plan direct to the measurement of hidden tourism in some Sicilian tourism districts.

Firstly, to introduce to the reference frame, we describe the time series of the last decade on official Italian and Sicilian tourism market. At the end, we highlight possible implication of hidden measurement on local policies.

1. INTRODUCTION

Purpose of this study is to make components of non observed tourism stand out, using all available information on tourism, and to suggest a research methodology plan to estimate hidden tourism in some Sicilian tourism districts.

Non observed tourism, like non observed economy, is on one hand, an opportunity of making profit for local marginal tourist trade; on the other hand it represents a cost due to an improper use of some services supplied by local bodies that work in territorial units with a high tourism presence. Knowing the effective number of tourists which are present in a specified area could be of a great interest, and it is more interesting if we look at the economic profits it generates.

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To introduce to our reference frame, we describe some data about official Italian and Sicilian tourism market then we reflect on the meaning and on the possible kinds of hidden tourism and we suggest a research methodology direct to its estimation.

2. THE REFERENCE FRAME: THE OFFICIAL STATISTICS ON TOURISM IN ITALY

Tourism is an economic sector that, in this last decade, is became more and more important. Tourism flow, in Italy as in other European and extra-European countries, is increasing continuously, and for this reason, there is an increased interest in it, also because it has a considerable effect on national GDP. Some data on the movement of Italian tourist market could be helpful to assess its importance.

From the time series on tourism flow in Italy (Table 1) we observe that in the last decade, arrivals are continuously changing from about 60 million in 1993, to 82 million in 2002, with a relative increase of 37% and a mean index of increase from one year to another of 3,5%.

The relative variations from one year to another aren’t constant, and this depends on fluctuations of a dynamic market like the tourist one is. The relative increases (see col. 3, Tab.1) are decreasing during the period we take into account, with the exception of the year 2000 that, due to Giubelee, is much higher than the past years, in fact we don’t find that it is a new trend of the series because in the years 2001 and 2002 we observe decreasing indexes.

The number of presences has also gone up: we note that there has been an absolute increase of 100.000.000 units (in terms of presence). The relative variation index of the 2002 is anomalous because it is a decreasing index.

If we consider the column of the nights spent (P/A), it is evident that it is constant and equal to 4, in fact it increases both arrivals and presences.

Seen as a whole, the tourism flow we examined, is characterized by a large flow and a constant length wave.

<table>
<thead>
<tr>
<th>Years</th>
<th>Arrivals (A)</th>
<th>% Variations (A/A_{t-1})</th>
<th>Presences (P)</th>
<th>% Variations (P/P_{t-1})</th>
<th>Nights spent (P/A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1993</td>
<td>59,534,912</td>
<td>-</td>
<td>253,614,258</td>
<td>-</td>
<td>4,26</td>
</tr>
<tr>
<td>1994</td>
<td>64,474,071</td>
<td>8,2</td>
<td>274,752,959</td>
<td>8,3</td>
<td>4,26</td>
</tr>
<tr>
<td>1995</td>
<td>67,168,685</td>
<td>4,1</td>
<td>286,494,792</td>
<td>4,3</td>
<td>4,27</td>
</tr>
<tr>
<td>1996</td>
<td>69,410,988</td>
<td>3,3</td>
<td>291,370,306</td>
<td>1,7</td>
<td>4,20</td>
</tr>
<tr>
<td>1997</td>
<td>70,635,012</td>
<td>1,7</td>
<td>292,276,323</td>
<td>0,3</td>
<td>4,14</td>
</tr>
<tr>
<td>1998</td>
<td>72,313,561</td>
<td>2,3</td>
<td>299,508,387</td>
<td>2,5</td>
<td>4,14</td>
</tr>
<tr>
<td>1999</td>
<td>74,320,938</td>
<td>2,7</td>
<td>308,314,729</td>
<td>2,9</td>
<td>4,15</td>
</tr>
<tr>
<td>2000</td>
<td>80,031,637</td>
<td>7,6</td>
<td>338,885,143</td>
<td>9,9</td>
<td>4,23</td>
</tr>
<tr>
<td>2001</td>
<td>81,773,368</td>
<td>2,1</td>
<td>350,323,133</td>
<td>3,4</td>
<td>4,28</td>
</tr>
<tr>
<td>2002</td>
<td>82,030,312</td>
<td>0,3</td>
<td>345,247,050</td>
<td>-1,5</td>
<td>4,21</td>
</tr>
</tbody>
</table>

Obviously, such a flow (that in the tab. 1 include both domestic and extra-domestic arrivals and presences and it doesn’t distinguish different kind of tourism), is a source of wealth. In the tourism satellite account we found that in 2001 tourism market has weighted on national GDP for a quota of 12%, (regarding the research on typologies of trips and tourism that includes production of all the sectors involved in a direct or indirect way to satisfy the tourism supply). Tourism contribution to employment is 9.4% of the total labor force in Italy; and this represents an underestimate as different sector contributes to the so called tourism industry but they are not included in this figure.

3. THE OFFICIAL STATISTICS ON TOURISM IN SICILY

Before describing some of the informations related to touristic flow in Sicily according to official statistics, we would like to talk briefly about the island characteristics that could help a better understanding about the available resources for tourist market in Sicily and what it could be if it became well exploited and settled: in Sicily we found the 30% of the national archaeological property (12130 are the buildings of architectural interest located in urban centre, 1950 the archaeological sites, 212.000 the finds of archaeological collections, and so on...) and the island with its extent (8.5% of the national extent) has 900 Km of bathing coast, almost the 19% of the whole Italian coast.

The trend of arrivals and presences in official accomodations (Table 2) has its own caracheristic that isn’t similar to those of national market except for the general trend to increase of arrival and presences. We may observe that the percentage increase of arrivals from baseline (1993) and 2002 is much stressed (about 70%) and presences are almost doubled, with a mean number of arrivals in the last five years of 3.800.029 units, and presences of 12.500.000. Also the data relating to nights spent is different from the corresponding one relating to Italy, in fact it has smaller lenght, of one day. Comparing Sicilian and Italian annual increasing indexes of arrivals and presences time series, we notice that Sicilian indexes are higher than the Italian one up to 2000, from 2001 the difference has become absorbed.

From the economic point of view, tourism market has weighted on Sicilian GDP for a quota of 3.5% in 2002, and this value is slowly rised in the last five years, with a constant index of 0.1%. Besides, tourism contribution to Sicilian employment is 20% of the total labor force in the island.

<table>
<thead>
<tr>
<th>Years</th>
<th>Arrivals (A)</th>
<th>% Variations (A/A_{t-1})</th>
<th>Presences (P)</th>
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<th>Nights spent (P/A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1993</td>
<td>2.375.803</td>
<td>-</td>
<td>7.749.817</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>1994</td>
<td>2.750.164</td>
<td>15.7</td>
<td>8.907.831</td>
<td>4.9</td>
<td>3.3</td>
</tr>
<tr>
<td>1995</td>
<td>2.929.859</td>
<td>6.0</td>
<td>9.548.344</td>
<td>7.1</td>
<td>3.2</td>
</tr>
<tr>
<td>1996</td>
<td>3.201.091</td>
<td>9.3</td>
<td>10.228.367</td>
<td>8.2</td>
<td>3.2</td>
</tr>
<tr>
<td>1997</td>
<td>3.233.295</td>
<td>1.0</td>
<td>10.329.942</td>
<td>1.0</td>
<td>3.2</td>
</tr>
<tr>
<td>1998</td>
<td>3.424.635</td>
<td>5.9</td>
<td>11.182.140</td>
<td>8.2</td>
<td>3.3</td>
</tr>
<tr>
<td>1999</td>
<td>3.627.586</td>
<td>5.9</td>
<td>12.041.157</td>
<td>7.7</td>
<td>3.3</td>
</tr>
<tr>
<td>2000</td>
<td>3.963.999</td>
<td>9.3</td>
<td>13.414.616</td>
<td>11.4</td>
<td>3.4</td>
</tr>
</tbody>
</table>
There is no doubt about the fact that in this last decade tourism in Sicily increased rapidly, but it is also true that the potentiality of tourism sector and the effective ability of attracting tourism flow are out of proportion, at least founding on official statistics.

4. HIDDEN TOURISM: DEFINITION PROBLEMS AND MODELS TO ESTIMATE TOURIST PRESENCES

As for others economic sectors, also for tourism, the product market, above all the local one, has stimulated the interest of some “marginal operators”. These have orientated the demand (incoming tourist flow) towards accommodations not gathered by official survey, getting start to hidden tourism.

The awareness of the existence of an higher component of informal supply and therefore of a satisfied demand that it is not registered as arrivals, has led researchers and corporations, that work in the tourism field, to be interested in “not-observed” tourism realizing the impact of the social, economical and environmental effects due to its presence, as well as the questions raising on political territorial management.

Early researches on this field are dated back to fifteen years ago, today we find some attempts of estimate of the non-observed tourist component in a lot of territorial units (also for Sicily).

We already said that our purpose is to make components of hidden tourism stand out, using all available information on tourism (not observed too), and to suggest a research methodology plan to estimate hidden tourism in some Sicilian tourism districts. In this sense, firstly we propose a reflection on the meaning and on the possible kinds of hidden tourism, after we suggest a research methodology direct to its estimation. Particularly, we describe the guidelines of our research project to the discovery the amount of hidden tourism in some Sicilian tourism districts.

For our arguments it is appropriate to distinguish two kinds of hidden tourism: concealed and ignored tourism. It belongs to the first the system of demand satisfied by a supply that is based on a network of proponents and on the receptive availability like the official one. Hidden tourism is probably one of the few manifestations that it isn’t characterized by typical marginal producers because it is born and it expands, but only in terms of receptivity, where there aren’t any official accommodations (or they are not sufficient). Official tourism doesn’t have that elasticity which is necessary to receive extemporaneousness and occasionally of the real tourism flow. Besides, official tourism doesn’t compete with those who manage hidden tourism but, on the contrary, it could take advantage selling own accessory services that are more elastic than those of accommodation.

The emerging could take place without damages for the emergent structure (in fact these are marginal structures only because they work, as a whole or as a part, as hidden structure), and without create any competition with official structures. Of course, income would emerge too, and the national and local fiscal draw would be a cut in the profit of hidden operators of tourism sector. This would have advantages, both in terms of social cohesion (due to the return within the law and to the official character of own social and economical role in the community), and of control and
maintenance of environmental resources. It is well to point out that only control and maintenance of environmental resources can assure the productive continuity of the tourism activity for a long time. These effects are indirect and linked to the capacity of local committee to make a good use of surplus of disposable means to programme and management of territorial units.

Ignored tourism is a statistic dimension of the hidden tourism, even if it isn’t deprived of economical and environmental effects. Ignored tourists are those who live in their own second-houses that are in tourism sites and, besides for the length of their permanence, they should be considered as excursionists, at least for the effects they produce. These “tourists” don’t foment hidden operators they don’t affect hospitality structures, it could be but only for hospitality due to relatives and friends but like excursionists, they produce effects on economic and social activity and, above all, they can condition the efficaciousness of services management and so the containment and control of environmental impact. It is the dimension of non-observed as supply and as demand in its wider meaning (ignored and hidden) that weigh heavily on socio-economic behaviour and on territorial order of interested areas. Direct information and indicators useful to estimate hidden tourism could be considered as indicators of social cohesion and of the economic variety that could come true when the phenomena emerges.

Concerning the models to estimate presences due to hidden tourism, we have already said that in Italy the first researches were written around 1990.

Making a short report on proposal found in the literature about estimation of tourism presence, we observe that there are basically three methods:
   a) comparison between official statistics from supply and demand, which is known as comparative method, (Gismondi, 2001 )
   b) use of one or more indicators of effective presences;
   c) sampling ad hoc research.

The use of rough and sketchy evaluations, provided by local committee that have to collect official data, is added to these methods.

The method more frequently used is that based on comparison between official statistics about supply and demand side, above all if the researcher takes in consideration a large area, while the method suggested by Becheri-Gambassi (1998 ) requires a mixed model, because it is composed of all the three methods we have mentioned.

As far as it is concerned the value of estimate of hidden tourism presences, relating to Italy, in 2001, we find presences of Italians, from Istat supply, for 203 millions of units, compared to 486 millions from Istat demand. The Sicilian quota is 8/32. Some sketchy valuations, provided by local committee, give the data on hidden tourism of some Sicilian tourism district, during summer, up to 1/5.

5. GUIDE-LINES OF THE RESEARCH PROJECT TO ESTIMATE HIDDEN TOURISM IN SOME SICILIAN TOURISTIC DISTRICTS

In our research about non-observed tourism we focus our attention on leisure tourism, in a particular area of Sicily and during the most typical period of its manifestation: in the months of July and August.
In particular, we’ll refer to a tourism district to have a well defined space where it is possible to extend the acting of institution for the planning of services and the physical allocation of receptive structures.

Our starting point is this simple model:

1. PP (Present population)- RP (Resident population) = ExP (Extra population)
2. ExP= T (tourists)+ O (others)
3. T= OT (official or observed (tourists )+ HT (Hidden Tourists )
4. HT= CT (Concealed Tourists)+ IT (Ignored Tourists)

To estimate the different types of hidden tourism it is necessary to integrate several sources of information. The possibility of this integration comes from the particularly nature of the kind of hidden tourism we refer to. Hidden supply we are analyzing is: 1. limited during the time; 2. it is active only during the complete occupation of official receptive structures; 3. it hasn’t accessory services besides that ones of the simple hospitality; 4. it can be removed without any maintenance expenses when tourism flow decreases or disappears.

Considering the peculiarity of leisure tourism in Sicily, the research intends to estimate the effective presences on territorial unit we are considering, by using some indicators of different kinds (social, economical and environmental) that are chosen firstly as those existing or obtainable ad hoc, and then isolated and aggregated in simple or composed indicators to research different estimate that converge to the true dimension we are looking for. During this phase of our research, from a methodological point of view, we will pay attention to the admissible range for the available indicators. The possibility of using the principle of “empty as full”, referring to a period of time and to a territorial unit that it is exactly identified, enables us to fix the maximum value for the estimate on the demand side, avoiding surprising and contradictory results that are often due to unidimensionality estimate of a complex phenomena.

Concerning the decomposition of unobserved presences in the two components of ignored and hidden presences, we will make use the interviews to tourists, which are a field-research. This last one has also the purpose to distinguish the matrix of tourism product between official and hidden tourists. Since the physical presences of people in the tourism district are formed not only by tourists plus residents but also by excursionists, and the great extent of the local services must be used by all kind of users, we will find to evaluate also the economic profile of this type of tourists.

6. SOME POSSIBLE IMPLICATIONS

The evaluation of hidden tourism is the first step to define the operative plans at a local level. These plans are directed towards both the programming of services, making a distribution of available resources by local department which are responsible for the management, and the acquisition of new resources made possible emerging hidden tourism.

The combination with excursionist phenomena, that leads to the evaluation of physical presences on a specified territorial units, allows not only to verify the limits of environmental compatibility and to integrate the programming of services, but, and
above all, to manage the covering expenses of their sojourn. In fact, especially when the combination excursionist-tourists exceeds the expected limits, knowing the effective presences could be useful to carry out a political project of containment and subdivision of tourist flows to protect the integrity of the environmental public property and, at the same time, to accentuate the productivity of tourist sector. It is obvious that the social and economical impact can’t be neglected and opposite results to those that have formed the previous hypotheses (fewer tourists and/or excursionists than the potential capacity), would involve in the management policies also the operators of the tourism sector in relation to the promotion of the area, starting marketing policies to the development of the supply.

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