

ab, aber wir brauchen weiterhin unbedingt Hotellerie und Gastgewerbe, auch wenn man dabei nicht unbedingt reich wird. Aber immerhin, es gibt Arbeit für viele. In diesem Lichte bietet sich die Entwicklung des Tourismus eher für strukturschwache Volkswirtschaften mit struktureller Unterbeschäftigung. Dass hochverschuldete Krisenländer wie Griechenland oder ärmere Länder wie die benachbarte Türkei dank Tourismus wieder wirtschaftlich etwas wachsen können, ist bemerkenswert. Das gilt selbstverständlich auch für weitere Länder.

Pour le tourisme suisse, à part la beauté de la nature et l'histoire omniprésente dans les villes et ailleurs, les atouts de la Suisse suivant sont importants: grande stabilité politique et monétaire (monnaies suisses depuis 1851), sécurité de droit, fonctionnement de l'Etat, éthique élevée de travail, flexibilité du marché du travail, peu de conflits sociaux, donc pas de grèves récurrentes. Tous ces avantages peuvent compenser les quelques facteurs problématiques tel le franc cher, notre monnaie nationale laquelle doit faire face à un € affaibli notamment.

Je n'ai pas parlé des autres avantages d'un tourisme dynamique qui suscite l'intérêt et la curiosité, comme les contacts directs entre personnes. Mais attention, pas de fausse illusion, le tourisme, ce n'est pas la fraternisation entre peuples!

Comme ailleurs dans l'économie, ce qui est essentiel, c'est la flexibilité et un développement dynamique. Et évidemment la publicité. A cette fin, l'organisation faïtière *Swisstourism* est très active et a un site Internet MySwitzerland.com avec des pages en russes.

Switzerland needs constant innovation to remain attractive for the global tourism industry.

Let's conclude: Swiss tourism shows a success story for now more than 150 years. But it's not a model, no copy past. Each country has its own elements to set up its successful tourism.

If you want to know more about Switzerland seen from Minsk then visit our *Facebook* <https://www.facebook.com/swissofficeminsk/>.

**C. Massidda**

*University of Cagliari (Italy)*

## **A SHORT ANALYSIS OF INTERNATIONAL TOURISM IN SARDINIA**

Worldwide, international tourism has risen appreciably during the last decades. According to UNWTO (2018), in 2017 the number of international arrivals reaches 1.323 million, growing of about 6.8 % with respect to the previous year. Africa and Europe show the best performance (8.6 % and 8.3 % respectively), followed by Asia and the Pacific (5.6 %), Middle East (4.6 %) and Americas (4 %). More in detail, the areas showing the high-

est growth rates are North Africa 14.9 %, Southern/Mediterranean-Europe 12.3 %, South-East Asia 8.6 % and South America 8.3 %.

Within this panorama, Italy weights a noteworthy share of the international market ranking the 6<sup>th</sup> place among the 10 world's top destinations for arrivals and receipts. Italy climbs several positions in Europe where it is the 3<sup>rd</sup> country, only after France and Spain. The picture changes considerably when growth rates are taken into account. Under this point of view, with only a 11.2 %, Italy drops to the 11<sup>th</sup> place among Southern-Mediterranean-Europe countries and to the 22<sup>nd</sup> place among Europe as a whole. One of the main reason behind this picture is the presence in Europe of fast growing countries that are gaining momentum within the international tourism panorama. An example is Azerbaijan that passes from a 6.4 % between 2016–2015 to a 20 % between 2016–2017.

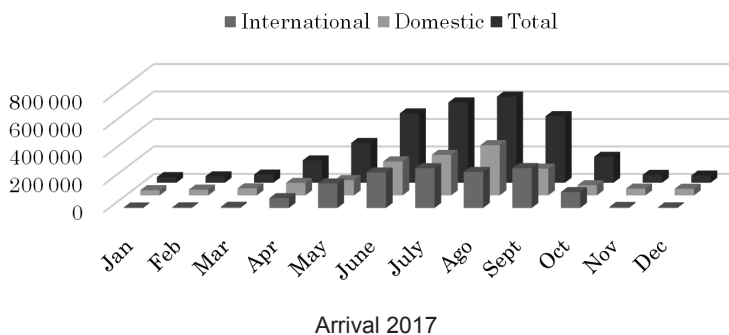
Passing to the regional perspective, Veneto, Lombardia, Lazio and Toscana are the regions with the highest international arrivals. In this respect, Sardinia ranks only the 11<sup>th</sup> position, after two of its main competitors that are Campania and Sicilia. Sardinia drops to the 12<sup>th</sup> for total arrivals, after Campania, Sicilia and Puglia. At international level, unfortunately Sardinia is behind its main competitors that are Baleari Islands, Corsica, Creta, Croazia and Malta. Despite these data, it is important to highlight that, with respect to its main competitors, Sardinia reports higher growth rates. In 2017, total and international arrivals grow of about 8.8 % and 12.7 % respectively. Domestic arrivals only grew of 3.2 %. The northern part of the island registers the highest growth rates.

Extending the time horizon to the last decade, the panorama is almost confirmed. However, while the international component has grown steadily, the domestic decreases until the 2013 and then it recovers a positive trend. As a result, in Sardinia the international tourism share has risen from the 33 % in 2007 to approximately the 49 % in 2017 (Osservatorio Turistico\_Report 2017). The principal origin countries are Germany 24 %, France 18 %, Switzerland 11 %, and Great Britain 7 %, that jointly reach more than 60 % of total international arrivals. Despite these shares, there are signals of a changing panorama since there are several countries, like Israele, Portogallo, Ireland, Brasil and Croatia, that report higher growth rates than those reported by the traditional sending countries.

Thus, in general terms, tourism statistics seem to show the Sardinian tourism market as a consolidated and growing reality, especially as far as the international component is concerned. However, in consideration of its potential in term of tourism attractiveness, these statistics might hide unexploited potentials for a destination like Sardinia to increase its market shares at both national and international level. In this respect, therefore, a lot of caution is needed because the level of international competition is rising very strongly. To struggle against its main competitors, the Sardinian tourism system needs to continue to attract market interest and increase tourism flows in a sustainable way, to increase its

attractiveness and competitiveness and to guarantee better tourism performance together with economic profitability. In this respect, some issues deserve to be discussed.

Worldwide Sardinia is famous for its beautiful beaches, whereas very little is known about its natural and cultural heritage. That is why tourists chose this island for their vacation mainly in summer time, making seasonality one of the main feature of the Sardinian tourism. As clearly shown in the following two graph, arrivals concentrate mainly between May and September and therefore, out of these months, the demand for tourist services falls dramatically.



Unfortunately, official data does not allow for a complete description of this phenomenon, especially as far as the demand for accommodation facilities is concerned. In Sardinia, a large quota of tourism data are «submerged» because of the growing importance of the sharing economy and because very often the renting of private houses is not officially recorded. According to recent data (CRENoS, 2018), in Sardinia the «submerged» counts for about the 50 % of the total domestic tourism.

Besides the strong seasonality, some other drawbacks weaken the tourism system in Sardinia. Common opinion is that the main criticalities of the system come from the nature of the tourism product offered to the market, the presence of unexpressed products to be organized, an unsuccessful marketing activity, the accessibility challenge and a lack of organization that causes the dispersion of efforts and resources. One of the main consequences is that the tourism market does not perceive the whole potential of Sardinia as a tourism destination. Experts and professionals argue that this is because tourism in Sardinia has developed mainly thanks to single initiatives (at both private and public level), but without a general plan for the Sardinian destination as a whole. Above all, they claim that it is necessary to increase the competitiveness of the entire tourism system in order to increase the attractiveness of the tourism supply. In this respect, it is essential to innovate, specialize, integrate and diversify the tourism product and, above all, to enhance

the attractions because their uniqueness is not enough to attract tourists. Only after that, effective marketing policies can be developed. It is necessary that the market starts to perceive and value the entire values of this Island as a tourist destination.

In other word, the Sardinian tourism system still needs to implement a model of central Governance with a clear vision and achievable goals, but strongly relying on the collaboration and cooperation between private and public stockholders. The future of the Sardinia tourism market necessarily depends on the implementation of policies able to guarantee strategic planning and sustainable growth. Under this perspective, it is noteworthy the recent Strategic Tourism Plan, named «Destination Sardinia 2018–2021», proposed by the Regional Government with the aim to establish the strategic lines of development, marketing and promotion to be implemented in the coming years. It has received strong consensus among stakeholders, but high uncertainty regarding its real implementation still remains.

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*Pham Anh, PhD  
Nguyen Minh Thu, MA  
Do Huong Lan, Assoc. Prof. PhD  
Ho Chi Minh National Political Academy (Viet Nam)*

### EVALUATION OF RUSSIAN VISITORS ON VIETNAMESE TOURISM SERVICES

Russian Federation has been acknowledged as one of the largest inbound markets of Vietnam with an overall significant increase in the number of Russian tourists within 2012–2017 period, except for a minor fall in 2015 due to Ukrainian crisis.

In 2017, Russia ranked the 6<sup>th</sup> and the 1<sup>st</sup> among international and European tourist markets in Vietnam, respectively. Russian tourists concentrated mainly in provinces of Khanh Hoa, Binh Thuan and Kien Giang. In order to understand the needs as well as the tastes of Russian tourists