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### **Social tourism and its ethical foundations.**

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## SOCIAL TOURISM AND ITS ETHICAL FOUNDATIONS

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Although social tourism has been seen in a number of countries as having potential to counter social exclusion, formulating a definition for the term is difficult. “Social tourism” is used to describe a variety of initiatives for a variety of different social groups. These range from holidays for children from low-income backgrounds, through improving accessibility in hotels, to offering ecological holidays. This article discusses the definitions of “social tourism,” distinguishing host-related and visitor-related forms, and aims to clarify its potential value in combating social exclusion. It does so by examining the ethical values underlying the way social tourism is defined and suggesting a theoretical framework for the effects of social tourism. Some ethical views of society place an a priori moral duty on the stronger strata to support the weaker. Others do not judge the support of the weaker strata as an a priori dominant ethical principle, and judge the welfare of the state by the opportunity of all its strata. Ethical positions that see stronger strata as having a moral duty to support the weaker are more likely to be supportive toward both host-related and visitor-related social tourism. Those that do not will probably support host-related social tourism, but will support visitor-related social tourism, if publicly funded, only if it can demonstrate benefits for the whole of society. In Western liberal democracies where this is a prevailing view, visitor-related social tourism might justify public expenditure as a potential tool to combat social exclusion. It can be seen as a merit good if it improves excluded peoples’ handicapping characteristics, through, for example, beneficial effects in health, self-esteem, and improvement of family relationships. However, there is little research to test its effectiveness in achieving these outcomes. Further research is required to evaluate whether social tourism can have a significant role in combating social exclusion, and thus justify support from public expenditure.

Key words: Social tourism; Social exclusion; Ethics

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### Introduction

This article looks at the idea of social tourism as it has developed in Western liberal democracies. It argues that the term “social tourism” has been used to connote a wide variety of different

and sometimes conflicting meanings and ideas, and to refer to quite different activities and programs. Some of these ideas and programs have a clear link to ideas about social exclusion; for others, the link is more tenuous. To clarify what is meant by social tourism, we focus on teasing out

some of its ethical origins, emphasizing particularly how different elements of social tourism are associated with different views on moral duties.

Within Europe there are strong traditions both of social cooperation and traveling for leisure purposes. It should therefore come as no surprise that "social tourism" has come to occupy the increasing attention of a wide variety of audiences. Legal entitlement to holidays with pay can perhaps be seen as an early example of society recognizing some sort of "right" to a holiday, or at least that all those in paid employment should be able to afford to take time off from work. Charities and trade unions have a proud history of providing funds, and/or the facilities to help people who would otherwise not be able to take a holiday to do so. Yet, although the phrase "social tourism" may to some imply tourism that is of benefit to society, the term has also been applied to tourism that has a strong social content, in that it promotes contact between the host and guest to mutual benefit. Given these widely different definitions, this article aims to examine the ethical underpinnings of the definitions of social tourism, to help develop a theoretical framework for understanding future research into social tourism. Within the scope of this article, it will be impossible to explain all ethical theories mentioned in great depth, and this article makes no pretence at incorporating all nuances of this very complex field of study. Still, when explaining a social initiative like social tourism, a link with the field of ethics seems a necessary and helpful tool for its definition and classification.

### What Is Meant by "Social Tourism"?

Although the question may sound simple, formulating a specific and all-comprising definition for this branch of the tourism industry is not as straightforward as it may seem, because such a wide variety of holiday types, destinations, and target groups can be involved. Given this difficulty, authors have chosen instead to focus on the aspects of society or social goals that the form of tourism under investigation is designed to help. Hence, focusing on tourism demand, Haukeland (1990, p. 178) describes how in Scandinavian countries "the concept of 'social tourism' means

that everybody, regardless of economic or social situation, should have the opportunity to go on vacation. Seen in this light, holiday travel is treated like any other human right whose social loss should be compensated by the welfare state" (p. 178). We can see this as *visitor-related* social tourism. There are clear links with this definition to the concept of "Tourism for All" (English Tourist Board, 1989), which works to aid those disadvantaged for whatever reason to satisfy their desire for a holiday. Examples of this form of social tourism might be the provision of accessible rooms in a seaside hotel in Britain, and the work of a small charity organizing holidays for children from disadvantaged backgrounds, such as the Family Holiday Association in the UK. We should note, however, that there is more at issue here than simply Haukeland's "opportunity to go on vacation." As Joppe (1989) pointed out, if the intention is to bring certain disadvantaged groups into the market for tourism, government can increase basic income through minimum wage legislation, family, rent, child allowances, and so on, as well as providing direct subsidy to holidays. If incomes are increased, disadvantaged groups are brought into the tourism market and have the opportunity to go on vacation in the sense that they can now afford a holiday, but there is no expectation that this is how they should use their additional funds—they might choose to spend them on clothing or consumer durables or clubbing. Intervention that is specifically targeted at increasing tourism, rather than increasing income, implies that tourism has some particular significance in terms of social exclusion; we explore this further below.

By contrast, social tourism can also be used to describe the effect on the supply side of tourism, the destination. Hence, Seabrook (1995) writes, "there is emerging a more convivial and interactive form of travel, a kind of social tourism; designed specifically to enhance and offer insight into the lives of people, which figures neither in the glossy brochures, nor in the media coverage of third-world countries" (p. 22). For Nilsson (2002) "interaction is the basic concept of social tourism . . . It was launched as a 'true' and non-commercial form of tourism. It was cheap and aimed to make people feel friendship with each other" (p. 10). Using these supply side definitions a group

holiday to Cambodia, highlighting the local cultures and habits of its inhabitants, could be described as social tourism. Given the increasing trend towards “sun-plus” holidays, an increasing amount of tourism could be described as “social tourism” using this supply-side definition.

A long established and rather different supply-side form of social tourism is government action to encourage visitation to particular areas. As Davidson and Maitland (1997, p. 146) point out, French Governments have used “the Cheque Vacances system (holiday vouchers for employees under a tax-free scheme) to achieve their own objectives of stimulating tourism development in specific areas, for example by channelling such holiday-makers to rural areas which are in need of supplementary economic activity.” All of these supply-side definitions focus on the destination and the host community, so we can see them as *host-related* social tourism. What separates visitor and host-related social tourism is the group of people who primarily benefit from tourism.

Seeking some common ground, Hunzinger describes social tourism as “the relationships and phenomena in the field of tourism resulting from participation in travel by economically weak or otherwise disadvantaged elements in society” (quoted in Hall, 2000, p. 141). A similar definition, which concentrates on participation, is used by the Bureau International du Tourisme Social (BITS): “By social tourism BITS means all of the relationships and phenomena resulting from participation in tourism, and in particular from the participation of social strata with modest incomes” (BITS, 2002). Using these definitions, social tourism is about encouraging those who can benefit from tourism to do so. This may represent a wide variety of groups, such as the host population of an exotic destination, tourists on a cultural holiday, persons with disabilities, their carers, the socially excluded, and other disadvantaged groups. This definition is comprehensive, but vague.

As a starting point for a deeper analysis we can use a very basic definition of social tourism: *tourism with an added moral value, which aims to benefit either the host or the visitor in the tourism exchange*. In contrast with the rest of the tourism industry, social tourism sees holidays not simply as a product, but as an expression of a certain

moral belief. Holidays can be seen either as a universal right, or as a tool to achieve aims that lie outside of commercial tourism: for example, equality, social inclusion, increase in independence, or economic development for disadvantaged areas. From a government point of view, holidays can be seen as having particular value for the participants and/or wider society—otherwise, concerns with social exclusion would be addressed by boosting income rather than focusing on this particular aspect of consumption. The underlying moral aim is the defining element in the process as it shapes the social tourism initiatives and will determine all other aspects of the holiday. This implies that to create a theoretical framework for social tourism, we need to start by analyzing the possible ethical approaches underpinning the phenomenon.

### *Underpinning Ethical Views*

From an ethical point of view, two distinct positions on the duty of the stronger strata in society toward the weaker strata are possible. Almost all ethical theories agree that every citizen has the same rights in society and is equal before the law. Members of society should all have opportunities to develop their life to an acceptable standard; it is even the duty of the state to make sure that they have these opportunities. However, some theories will particularly stress how society can be seen as a combination of actors, with each actor shaped by their environment. Hence, it is the duty of society to bring out the best in every member. If every citizen looks out for their fellow citizens, and the stronger strata support the weaker ones, society automatically reduces the inequality between its members and, it is argued, becomes stronger. Supporting and emancipating the weaker strata can thus be described as an a priori predominant moral principle within this view of society. Alternatively, there are ethical theories that do not support this a priori obligation for the stronger economic strata to support the weaker ones: they mainly stress that the opportunities provided to one person should never limit the opportunities of another. Thus, the morality of an action is determined by whether an individual can promote their own welfare, or the welfare of society, without hindering the opportunities of others. This does not rule out

that the weaker strata could benefit, as their welfare cannot be threatened, but this view on society does not accept the unchanging duty to enhance the opportunities of the weaker strata.

The following discussion reviews this range of ethical approaches and their links to social tourism. This allows us to clarify the very different and sometimes conflicting ethical origins of the term "social tourism," and to better understand why and in what circumstances governments may seek to promote it. The following section briefly discusses four ethical theories, and the subsequent section considers how they can be linked to a possible moral justification of host- and visitor-related social tourism.

### *Christian Ethics*

That *Christian ethics* have influenced the moral beliefs of a great number of members of Western Christian-influenced societies comes as no surprise: religious values are often the first moral judgments children come into contact with through their parents or their education in school, and are deeply embedded in many societies. Christians have a duty to seek God through good moral behavior, and to find out what exactly this stands for they can turn to the Bible and other religious texts. Charity is superior to all the other virtues, and is defined as "the theological virtue by which we love God above all things for his own sake, and our neighbor as ourselves for the love of God" (Catechism of the Catholic Church, 1994, p. 404). There are various ways in which a Christian can act charitably. An obvious example is almsgiving to relieve need, but Charity also hints at a more general concept of solidarity. It is the task of every Christian to support the poor in a material and in a spiritual way to the best of their abilities, as this is the will of God. Not only does the Christian do this because it is the will of God, it is also their only way to pay the consequence of original sin and to be forgiven in the afterlife. The motivation of reward in the afterlife is unique to religious ethics, and implies that what is good will always equal what is right, regardless of the costs or the benefits, as there is no greater benefit than a blessed afterlife. Limitless charity towards the less fortunate is a way to achieve this, and thus the

duty of every Christian. An economist might make a distinction between a morally "good" and an economically or politically "right" decision, but for a Christian, this distinction cannot exist. Baelz describes this as one of the main differences to secular ethics: "Often we consider our secular moral duties to be limited. The claim of respect for persons goes so far, but no further. . . . Christian morality apparently breaks down the limits which we normally recognize. There are no limits to love and forgiveness" (Baelz, 1982, p. 86).

Linking this back to the underlying views of society mentioned earlier, Christian ethics stress preferential love for the poor and the disadvantaged in the community. This view on society can serve perfectly as an ethical basis for many different forms of social tourism. The Church, for instance, played a big role in one of the earliest forms of social tourism, whereby children from inner city backgrounds were taken to the seaside or the countryside during the school holidays, mainly for health reasons. Christian organizations today are still involved in offering holidays for children, the elderly, the sick, and the disabled, and (particularly in mainland Europe) many of them even own their own hotels or holiday centers to accommodate their visitors. In Belgium, for example, the Christian Labour Union and the Christian "Mutualité" (health insurance organization) own accommodation facilities both in Belgium and abroad. They organize holidays for children, families, the sick, and the elderly. Other examples are "Secours Catholique" in France and the "Associazioni Cristiane Lavoratori Italiani" (ACLI) in Italy.

### *Marxist Ethics*

Marxist theory can be described as a form of "dialectical materialism." The term "dialectical" refers to the principle that the world cannot be seen as a collection of things, but rather as an evolving process. One aspect of "materialism" is that there are no gods or other spiritual forces behind the material reality, so that people are the products of circumstances and upbringing. A change in circumstances implies a process of education and development (Sowell, 1986, p. 33). This implies thus that the world keeps on changing and evolving, driven by conflicting human forces

in society. This is also the basis for Marx's views on history, as is shown by the famous first sentence of his *Communist Manifesto*, "The history of all hitherto existing society is the history of class struggles" (Marx & Engels, 1967, p. 79).

This concentration on an ever-changing society also has ethical implications. It is argued that as society changes, ethical values will change, and historical justification is the only justification (Sowell, 1986, p. 7). Each stage of the change is necessary to reach the ultimate aim of a society in which the full and free development of every individual forms the ruling principle (Sowell, 1986, p. 12). In this society, members should be able to develop and exercise their physical and mental faculties without restrictions. This was seen as the difference between capitalism and socialism: "The opposition between capitalism and socialism is essentially and originally the opposition between a world in which human beings are degraded into things and a world in which they recover their subjectivity" (Kolakowski, 1978, p. 287). Although Marxism is a mainly a scientific view on society, the aim for the working classes to retrieve their subjectivity could be seen to entail both ethical and political implications. On an ethical level, this vision can be seen as a call for the free development of each member of society, and the working class's equality in their right to this development. On a more practical and political level, Marx saw the shortening of the working day as one of the basic prerequisites to make laborers recover their sense of self (Marx, 1981, p. 86).

Like Christian ethics, Marxist ideas see it as an *a priori* duty of the stronger strata to support the weaker. The equality of all members in society is an important element of Marxism, and this has had impacts on the introduction of holidays to workers. Marxist analysis was one element of a growing Labor and Trades Union movement of the 19th and 20th centuries, in which improvements in wages and working conditions included demands for reductions in working time. Not only was the working day shortened, holidays were also made possible for a larger group of workers through, for example, the Holidays with Pay Act (1938) in the UK and the direct provision of holidays through holiday homes owned by the Unions. Linked with Marxism, the socialist and social democratic

movements sought to allow each member in society to develop his or her full potential, and concentrated their actions around the principles of the equality and development of each individual. This has enabled the movement to concentrate on the needs of different target groups, such as women's associations, youth associations, and organizations for the sick and the disabled. Today, socialist organizations remain important players in social tourism, mainly by means of their accommodation provision. In France, examples are the "Union Cooperative Equipment Loisirs" and "Union Nationale Mutualiste Loisirs Vacances." The latter concentrates its efforts around families on low incomes, and also offers technical and financial support for not-for-profit organizations. In Belgium, the socialist Labour Unions and *Mutualités* (health insurance organizations) own an impressive patrimony of holiday centers and accommodation. They organize holidays for children, families, the disabled, and the elderly. An example in Italy is ANCST, part of Legacoop.

### *Kantianism*

Kant's views on ethics are founded on what he describes as the "categorical imperative," whereby one must act in such a way that the principle behind this behavior could be universally adopted. Hence, Kant would determine that lying is morally unacceptable because we expect others to tell the truth to us; therefore, by lying, we would be acting in a way we would not want others to act toward us. A second element to Kant's theory is the respect for the individual: "Act in such a way that you always treat humanity . . . never simply as a means, but always at the same time as an end" (Chyrysides & Kaler, 1993, p. 99). This principle has major implications when considering the duties of the individual toward other members in society, as Kant would argue that no one can be forced to sacrifice their own autonomy for the greater good.

The Kantian view on the role of the stronger strata in society does not see the support and sacrifice toward the weaker group as an *a priori* moral duty. Although one must respect each member of society as an individual in his or her own right, no member can infringe on another's opportunity

merely for their own benefit. According to Kant, the primacy of the individual is a central tenet, and this would rule out certain social tourism initiatives whereby one group is forced to sacrifice its autonomy for the access to holidays of another group. Thus, according to Kant, the government has no *a priori* moral duty to spend public money on improving the access to holidays for low-income groups, as this may not have any clear and equal benefit for the other strata of society, denoting a key difference to the ethical positions discussed above. Social welfare is an important element in the Kantian respect for the individual, but other ways of spending public money might seem more appropriate, as so far, it has not yet been established how far other groups in society benefit from visitor-related social tourism. Yet, Kantianism also implies that the tourist should not take advantage of poorly paid staff, lax environmental regulations, or oppression of local communities to enjoy their holiday, as such practices could not be a maxim for a universal law. In this case the local community (the individual and the ecosystem) would be used as mere means to an end (the relaxation and enjoyment of the tourist), and a threat to the autonomy of the host community. Forms of social tourism like ecotourism or sociotourism, supporting local cultures, communities, and ecosystems would be a preferable alternative for the traditional tourist industry, and would be more acceptable to Kantian theory.

### *Utilitarianism*

Utilitarians consider that it is the consequence of actions that determines their moral character rather than the actions themselves. Actions cannot be considered good or bad in themselves, but instead be judged good or bad by the consequences of the action. Jeremy Bentham defined utility as “happiness,” as it is the only thing desirable as an end in itself. Still, this is not an egoist or selfish theory as personal utility needs to be in line with the common good to be acceptable. For example, one cannot steal to improve one’s own utility, as it would diminish the utility of others. In lay terms, utilitarianism is expressed as the greatest good for the greatest number and finds common expression through the idea of cost-benefit analysis.

At first sight, there might seem to be similarities between utilitarianism and Marxist theory, as both strive for the common good, and there are no strict principles for moral behavior. Harmful selfish actions have to be eliminated if they threaten the common good, which can be described as the optimized sum of human utility and the arbiter of right and wrong (Chryssides & Kaler 1993, p. 94). Still, there are also considerable differences, the most important one being the cost-benefit approach of utilitarianism. Although utilitarianism strives for development of the common good, it does not strive for equality. Instead, utilitarianism seeks to maximize the sum of individual utilities, while being unconcerned with the distribution of these utilities (Fisher & Lovell, 2003, p. 142). Although disbenefit is weighed heavier than benefit, a utilitarian would never allow the common good to marginally decrease to help a minority group in society.

Utilitarianism does not consider support for the weaker group an *a priori* duty. Instead, it is the average member of society who should benefit, and this stress on the “greatest number” in society means that the polarization between the general public and the people on the edge of society can only increase. In other words, a utilitarian would find it “morally wrong to discriminate against a rich or otherwise fortunate person to reduce the difference between him and the poorer or otherwise less fortunate members of society” (Harsanyi, 1993, p. 134). This implies that social policies will not be evaluated on how they improve the quality of life of the weaker group in society, but on how they help the largest number in society. Social policies are thus assessed on the basis of a cost-benefit analysis for society as a whole.

The cost-benefit approach to the common good underlies that branch of economics concerned with production efficiency and allocation—welfare economics. Welfare economics is “the study of the way in which the economic processes of production, consumption and exchange affect the well-being of society. It seeks to indicate ‘how economic systems ought to work, in order that the social welfare can be increased’ ” (Walker, 1981, p. 13). Welfare is then defined as “the vector of individual utilities” (Ng, 1979, p. 3), and because social welfare is an entity composed of individual

welfares, it is clear that the appropriate government body should take full recognition of the tastes and desires of individuals in respect of the nature and purpose of its intervention (Walker, 1981, p. 97). A way to satisfy the tastes and desires of as many individuals as possible is the provision of merit goods. These are "goods considered so meritorious that their satisfaction is provided through the public budget over and above what is provided for through the market and paid for by private buyers" (Knapp, 1984, p. 95). Hughes (1984) argues that consumers should not be prevented from consuming such goods through low income or ignorance. The most familiar examples of merit goods are education, health care, and defense.

To many people the most important objection to the market provision of these goods is the market's inability to allocate services according to need. A perfectly functioning market will allocate services according to the consumers' ability to pay, and there is no necessary correlation between the distribution of income and the distribution of need (Knapp, 1984). However, if income distribution were the sole concern, it could presumably be dealt with by mechanisms to increase the incomes of low-income groups or the socially excluded, as we previously discussed. Individuals would then be left to consume merit goods or not, as they chose. In fact, because the essence of merit goods is that society feels they *should* be consumed, they are usually provided in a way that eliminates the possibility of diverting spending elsewhere. State schooling is (currently) free and compulsory in the UK. Even those advocating a much more marketized system do not suggest that parents or children should be given an education allowance or voucher that they could cash in for chips in casinos if they chose gambling rather than learning.

The key question in the context of this article is thus whether social tourism should be seen as a merit good—as Hughes argued it was by some governments when he discussed the subject some 20 years ago. For utilitarianism and welfare economics, with their cost–benefit perspective, the ideal improvement is the Pareto-improvement, a situation whereby the welfare of one or more individuals increases and no other individual's welfare decreases. Social welfare is thus at a maximum

when no individual can be made better off without one or more being made worse off. An example of a Pareto improvement in host-related social tourism could be an ecological holiday provided by a commercial tour operator. The tourist pays extra for an exclusive holiday and supports the destination's ecosystem in this way, but the greater good in their home country is not affected in any way.

Using the demand side, visitor-related definition of social tourism, government schemes supporting disadvantaged groups are an entirely different matter, as only a small group of society is eligible for these holidays, and the rest of the population does not benefit directly. As the potential benefits of visitor-related social tourism have not been fully researched at present and are thus somewhat unclear, visitor-related social tourism cannot be considered a merit good to the same degree as education or defense. Of course, this judgment depends upon how costs and benefits are measured—and how directly these need to be felt before they are considered relevant is a more open question. Still, government spending can only be justified if it can be proven that social tourism increases utility across society as a whole. We return to this point below. Public welfare might, instead, choose to spend money on services that more clearly benefit the whole of society, and not just a certain social group (e.g., education, health, or housing). (Charities providing social tourism to particular groups, though, would not need this justification, as donating money is not compulsory, and the utility of the greater good is unaffected.)

#### Views on Society and the Moral Justification of Social Tourism

In the previous paragraphs different ethical theories can be thought of as having been placed on a continuum depending on the *a priori* moral duty they allocate to the stronger strata in society to support the weaker ones. On the one hand, there are moral theories that place great stress on this duty: Christian and Marxist ethics are examples. However, as different as these theories are (in many ways they even oppose each other), they have this aspect in common: for Christian ethics the duty to support the weaker strata of society



comes down from God; Marxist ethics pursue the same goal of helping the most disadvantaged, but do so because of a duty to the individual. From this moral point of view, social measures are successful if the weaker strata in society benefit, and there is no difference between what is morally good and what is the right thing to do for society. Within the context of this article, these theories can be labeled as “socialized”: they view society as a combination of actors, and each of these actors is influenced by the others in his place in society. To make the community move forward, the stronger strata have the duty to help and support the weaker strata in every possible way.

On the other hand, there are the theories that do not stress this duty, but which focus more on the utility of society as a whole. These theories stress the autonomy and opportunity of every individual in society, not just of the weaker strata: each member has to be protected, and his rights cannot be harmed. This does mean that social welfare is an important element, but this view of society will more readily support forms of social welfare where all stakeholders benefit, or where the benefits outweigh the costs for the majority of individuals in society.

Kantianism and utilitarianism are both examples of theories on this side of the continuum. Even though they are very different and usually not classified together, they both view society as a collection of individuals who should all be respected, and their autonomy should not be breached unless society as a whole benefits. In the context of this article, these theories could be called “individualized.” This does not imply that these theories are necessarily egoist or against social welfare—quite on the contrary. Both theories stress the duties of the individual toward the community. But the *a priori* preferential beneficiary of this duty should not necessarily be the weaker member in society, but its average member.

Stereotypical assessments would find that Westernized countries more readily accept the individualized approaches, and social tourism in line with this ethic may prove more acceptable than a form of social tourism that stemmed from the socialized approach. In the remainder of this section we review what forms of social tourism can

be supported by reference to individualized approaches.

Where the *hosts* are concerned, tourism has long been seen as a factor that could introduce greater equality in different parts of the world through investments and the development of tourism facilities. Socialized views of society are compatible with this type of social tourism because it can offer a means toward greater economical equality, and a chance for the weaker strata to benefit more from the opportunities of tourism. This type of social tourism is also compatible with individualized perspectives, provided it does not require a reduction in the utility of visitors. Many considered the tourism industry to be a virtually costless generator of employment and well-being, offering seemingly limitless opportunities for “real” economic development to countless communities away from the centers of global industry and financial power (Deakin, Davis, & Thomas, 1995, p. 1). The negative effects of tourism have shown over the last years that commercial tourism can be a far from perfect weapon to battle social inequality, as the facilities are often in the hands of foreign investors, whereas the local population can often be employed in low-paid and seasonal jobs. The effects on the environment have sometimes been disastrous for local ecosystems, and local cultures exploited as cheap tourist attractions. As a reaction to these effects of tourism, new tourism forms have developed that can be seen to be part of “social tourism.” They can concentrate on different key issues: the environment (in ecotourism) and the local culture (in sociotourism) are the most prominent. The aim is to establish a form of “non-intrusive” tourism, with respect for the host population, its environment, and its culture. The tourists do not stay in international hotels, but in locally operated accommodations, and the money spent by the tourist will go more directly to the host community.

This form of tourism can be justified both by an economic and an ethical argument. From an ethical point of view, tourists can enjoy a (rather exclusive) holiday, as long as the host community can benefit from the revenue that is created in this way. This form of tourism seeks to ensure that the negative effects of tourism are reduced to a

minimum. Barkin (2000) gives the example of tourism in rural communities in Mexico:

These rural communities can become well equipped to receive small groups, and ensure respect for the ecosystems they visit. Various forms of tourism catering to niche markets of foreign visitors and low-income travellers from within are proving most attractive to communities searching for ways of promoting profitable avenues to generate income and employment opportunities while sacrificing as little of their traditions and inherited production systems. (p. 2)

[Whether in practice a more beneficial development is achieved is, however, an empirical question. Key issues are the extent to which tourism development is embedded in local economies and the extent to which inward investment is additional (Shaw & Williams, 2004).]

The economic argument for host-related social tourism is that even though it can become more expensive to travel this way (as employees are paid a fairer wage, local products and logistics can be more expensive than international imports, etc), there is a customer group who is willing to pay this financial difference out of free will. The exclusiveness of the experience can make it rather sought after for a group of affluent tourists who want to do and see things that are not yet discovered by mass tourism, and see the conditions in which people live without losing the pleasantness of a holiday.

When it comes to *visitor*-related social tourism, initiatives are mainly targeted at two, rather different, disadvantaged groups. One set of tourism initiatives are aimed at travelers with disabilities, and strive for equal opportunities for this group to enjoy a holiday in the commercial tourism sector. The Holiday Care Service in Britain is a good example of this group, describing their vision on social tourism or “Tourism for All” as “an invitation to the tourist industry to take a wholly positive attitude to what have conventionally become known as ‘special needs’ ” (English Tourist Board, 1989, p. 13). The second set is initiatives for low-income or socially excluded groups, for people who cannot afford a holiday in the commercial tourism circuit. In each case, for those who take an individu-

alized approach, justification for supporting social tourism will depend on there being net social benefits that can increase the utility of society as a whole.

As far as travelers with disabilities are concerned, initiatives to tackle shortcomings in the accessibility of accommodation and attractions can open up new and potentially lucrative markets to the provider of the accommodation or attraction. The UK government recently declared the combined spending power of people with disabilities to be £80bn (BBC News, 2004), and thus, a considerable market for those organizations prepared to make changes to their business practices. Persons with disabilities are largely excluded today because they cannot access tourist facilities, not because they cannot afford them. Demographic changes that increase the number of the “affluent old” will make this even more so in the future. Promoting “Tourism for All” might therefore be seen simply as an initiative to deal with market failure, where unmanaged markets fail to respond efficiently to changing demand. Improving accessibility increases opportunity for disabled people, but is also an investment that can be financially worthwhile, so the nondisabled members in society do not have to sacrifice their own utility, and there are likely to be net social benefits, and ones that are increasingly widely perceived. Visitor-related social tourism for people with disabilities can be justified by both the socialized and individualized views on society. Socialized theories appreciate that the benefits go to a weaker group in society, in the sense that they would have not been able to access holidays without this intervention. Individualist theories justify this form of social tourism by highlighting that the investments made for visitors with disabilities can be rewarded by the extra revenue that is created through their custom.

By contrast, low-income groups cannot afford a holiday, and the wider benefits for society of offering them one are largely uncertain, as there is very limited academic research around this subject. This is not an objection for socialized theories, as visitor-related social tourism for low-income groups supports and helps the weaker strata in society, and is thus *a priori* good and

right. From an individualist point of view though, it is important to note that as long as there is no proof of the potential benefit of this type of social tourism for society as a whole, the stronger social groups would make a certain sacrifice without being sure that the benefits of this operation would outweigh the costs for the general utility. Individualized theories would thus not *a priori* support visitor-related social tourism for low-income groups.

Yet, this does not mean that from an individualized point of view public funding can never support this type of social tourism initiatives. It will do so provided it can be proven that social tourism initiatives can have positive implications for the rest of society, for example, via a change in the behavior and attitudes of the target groups, with a reduction in associated costs for society. If visitor-related social tourism can bring about changes in the target groups that in turn generate net social benefits, then it may be plausibly seen as not just charity, but a merit good and an investment, a sort of social policy with benefits for every citizen. In the case of low-income or socially excluded groups, the target could be reintegration through tourism, improvements in family relations, and parenting skills, creating a greater willingness to travel (thus improving job search) or an improvement in mental or physical health.

There is some limited evidence to support these beneficial effects of social tourism. A study by the English Tourist Council, for example, showed that holidays had a beneficial effect on the mental and physical health of the holiday makers, and led to a reduced number of visits to health professionals (English Tourist Council, 2000, p. 5). Holidays may also have beneficial effects on interpersonal relationships, increase self-esteem, or widen travel horizons. A study in Quebec, for example, has shown the beneficial effect of visitor-related holidays on the relationships within the family, with an increase in overall well-being as a result (Gaudreau, Jolin, & Buissonnet-Vergert, 1999). By aiming to bring dysfunctional families closer together, the holiday was a success, although in monetary terms no profit was made, and no immediate change in the economic situation of the family was noted.

Initiatives like these aim to improve the well-being of the participants beyond the scope and

length of the holiday, for instance in terms of an improvement in self-esteem, physical or mental health, or social skills. As the research about the effects of holidays in general and visitor-related social tourism in particular grows, more evidence might be found to make this form of social tourism more acceptable to the individualized ethical theories. Yet the principal difficulty for social tourism is trying to measure the social benefits it brings to an individualized society. More research is needed into the initiatives that prove to be successful, the forms of social tourism that are beneficial, for whom and against which ethical background.

### Conclusion

The variety of different forms social tourism can take and the many different target groups that initiatives can be aimed at make it difficult to construct a general and all-comprising definition of the concept or measure by which its success can be judged. An analysis of the ethical theories underlying the different forms of social tourism is a helpful tool to give each form its right place in the spectrum, to clarify their different origins so to make the concept more manageable. As shown earlier, the two main types of social tourism, visitor- and host-related social tourism, can be understood in terms of the different views on man and society in ethical theories. This not only influences the theoretical outlook one can adopt on social tourism, but also holds certain implications on a more practical level. Recognizing the underlying ethical values that shape social tourism forms not only helps to categorize different initiatives, it also challenges its practitioners to assess the success of these initiatives.

Host-related social tourism is comparatively easy to justify from both socialized and individualized perspectives. The position with visitor-related social tourism is more complex. If the moral aim of visitor-related social tourism is to combat social exclusion via a visitor-related social tourism initiative, the categories for assessment are difficult to determine. One could investigate if there is an increase in the travel horizons of the participants after the holiday, for example, or question them about their mental well-being. In a

society that accepts the socialized approach, then “merely” meeting this first challenge and demonstrating that the outcomes of the project have been met will be sufficient. Yet, in an individualized society, the wider benefits to society from the expenditure of public money must be demonstrated, and this presents a further significant challenge to the practitioners of social tourism—are costs of health care or social support reduced, or is there an increase in numbers in paid employment, for example. This article has demonstrated that the ethical underpinning of social tourism reveals real problems for researchers and practitioners to tackle if tourism is to have a significant role in combating social exclusion.

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