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Educational tourism as a driver for rural development: assessing competition and strategic choices of Italian language and culture schools in the Marche Region (Italy) through Porter's Five Forces

Sabrina Tomasi*, Alessio Cavicchi**

Abstract

Educational tourism is a growing industry, that includes a variety of niches. Among these, language tourism involves language and culture schools for foreigners that also provide hospitality and tourism services, including tours and excursions, field visits and cultural initiatives, and experiential workshops. These realities, if located in rural contexts, can represent a growth factor for rural areas and an opportunity for cultural exchange between tourists and local communities. To better understand forces and factors influencing this industry, this study describes the case of two Italian language and culture schools for foreigners which also offer tourism services in a rural area of the Marche Region, near the city of Macerata. Through semi-structured qualitative interviews and by applying the theoretical model of Porter's Forces, the case presents an overview competitive environment, pointing out strategic choices and distinctive aspects of the presented realities.

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Il turismo educativo rappresenta un'industria in forte crescita, che accoglie al suo interno una serie di nicchie molto variegata. Tra queste vi è il turismo generato dall'offerta formativa delle scuole di lingua e cultura per stranieri che, oltre ai servizi relativi all'insegnamento della lingua, offrono ospitalità, tour ed escursioni, visite e iniziative culturali, laboratori esperienziali. Tali realtà, se localizzate in contesti rurali, possono rappresentare un fattore di crescita per le aree rurali e un'occasione di scambio culturale tra turisti e comunità locali. Per comprendere al meglio le forze e i fattori che influenzano il settore, questo studio descrive il caso di due scuole di lingua e cultura italiana per stranieri che offrono anche servizi turistici in un'area rurale della Regione Marche, in provincia di Macerata. Attraverso interviste qualitative semi-strutturate e applicando il modello teorico delle Forze di Porter, il caso presenta un quadro generale del contesto competitivo, sottolineando scelte strategiche e aspetti distintivi delle realtà presentate.

1. *Introduction*

Educational tourism is a growing industry that entails a high number of specialisations. Several authors include cultural tourism, ecotourism, volunteering tourism, agritourism, study abroad programmes for higher education students, school excursions educational cruises exchange programs, adult and senior study tours (for different purposes, such as course credits acquisition; professional development; upskilling) under the umbrella name of educational tourism¹. Among these, both language travel and language tourism are included². Language education providers are the main actors involved in this sector: they both provide educational and tourism services³ and they can act as key players in the valorisation of less-known tourism destinations, especially when located in rural areas. Their services have the potential to attract a large range of educational tourists interested in experiential learning in informal contexts, allowing them to practice the language and immerse themselves in the local culture and way of life while meeting and interacting with locals, as well as through visits to historical sites and participation in cultural events and festivals⁴. In 2019, in the Marche Region, 14 Italian language and culture schools provided both educational and tourism services, of whom 4 also offered accommodation facilities. They mostly worked in the language tourism supply and many of them were located in rural areas. They mainly provide short-term classroom-based study abroad programmes on Italian language and culture

¹ Ritchie *et al.* 2003; Richards 2011; Sie *et al.* 2016; Nugroho, Soeprihanto 2016.

² Laborda 2007; Iglesias 2016; Boekstein 2017.

³ Iglesias 2016.

⁴ Boekstein 2017.

that, besides the frontal classes include experiential activities (e.g.: excursions and cultural activities)⁵.

This exploratory paper investigates the forces and factors influencing competition and strategic choices in the educational tourism industry in the Marche Region, by presenting and comparing two cases of two Italian language and culture schools that provide education, accommodation and other tourism services in the rural surroundings of the city of Macerata. By applying Porter's Five Forces framework, enabling the identification of the forces controlling competition and profitability in a certain industry⁶, semi-structured qualitative interviews were conducted with the entrepreneurs running Italian Language and Culture Schools in the area. The objective of this study is to learn about the functioning of the sector in the local context and to assess how providers manage competitiveness and strategic choices, also depending on the rural context in which they are embedded.

This paper is structured as follows: the first section reviews the literature on educational tourism and language tourism, describes Porter's Five Forces framework, and reports on its application to the tourism industry. The second section explains the background context, with an overview of the language schools' educational tourism businesses in the Marche Region. Methodology, with the presentation of the face-to-face interview protocol elaborated according to Porter's framework is then presented. Findings, Results and Conclusions are then presented with results from the application of Porter's framework to the educational tourism industry in the Marche Region.

2. Theoretical Framework

2.1. Language tourism as educational tourism

The relationship between travel and learning was described by Falk *et al.*⁷ who identified the characteristics of learning that can happen through tourism. They indicated learning as a life-long and life-wide process yielding a highly individual product and as the result of the construction of a personal meaning about the many experiences lived in time and space, which do not exclude the component of fun. Educational travel and study abroad programmes can foster intellectual and personal growth, intercultural awareness, foreign language acquisition and professional development⁸.

⁵ Engle, Engle 2003; Peterson 2007; Iglesias 2016.

⁶ Porter 2008.

⁷ Falk *et al.* 2012.

⁸ *Ibidem.*

An educational tourist can be described as a person who spends an overnight vacation or makes an excursion for the primary («education first») or secondary («tourism first») motivation to learn⁹. However, Sie *et al.*¹⁰ connect «education first» tourism to formal learning and describe «educational tourists» *tout court* as gaining self-directed learning in non-formal contexts while travelling. Tourism packages provided by language schools, also addressed to adults, may be included in the «education first» category¹¹, even though for these tourists «participation in activities, learning processes and experiences derived from the trip is influenced by the relationships and interactions between participants, tourism providers, local communities and the surrounding environment which is involved in attracting and hosting them»¹².

While language travel and language tourism are mainly used synonymously, Laborda¹³ makes the distinction that the goal of language travel is language learning, while that of language tourism is a combination of learning and entertainment.

Some authors¹⁴ defined language tourists following Ritchie *et al.*'s description¹⁵. According to them, language tourism can be included in educational tourism, in a position between the «education first» and the «tourism first» segments. Iglesias¹⁶ defined the language tourist as a person who engages not only in language learning tasks, but also in tourism activities, and thus the language tourism product comprises a language learning component which is educational and a travel component which may include transport, accommodation, catering and leisure arrangements. The author considered three key elements of the language tourism product: 1) the product composition; 2) the marketing and management structure charged with planning, promoting, selling and providing the language tourism product and 3) the environmental and social resource base of the destination. These elements are described in Table 1.

⁹ Ritchie *et al.* 2003.

¹⁰ Sie *et al.* 2016.

¹¹ Ritchie *et al.* 2003; Pitman *et al.* 2010.

¹² Sie *et al.* 2016, p. 107.

¹³ Laborda 2007.

¹⁴ Iglesias 2016; Boekstein 2017.

¹⁵ Ritchie *et al.* 2003.

¹⁶ Iglesias 2016.

<i>Language tourism key elements</i>	<i>Characteristics</i>	<i>Details</i>
Product composition	Language learning component	Educational input
		Language learning complements
	Travel component	Transport
		Accommodation
		Catering
	Leisure	
Marketing & management structures	Language education providers	
	Public administration institutions	
	Trade bodies	
	Travel planners	
Destination's environmental & social resource base	Local culture	
	Host community	
	Geographical context	
	Current situation (political, economic, social, technological, environmental & legal factors)	

Tab. 1. Language tourism supply: the language tourism product (Source: Iglesias 2016)

For the purpose of this study, it is important to note that Iglesias¹⁷ includes language education providers in the marketing and management structure, and that the local context (environmental and social) plays a pivotal role. Indeed, certain cultural activities such as meeting and interacting with local people, experiencing local culture and way of life, as well as visiting historical sites and attending cultural events and festivals are important for language tourists¹⁸.

The main suppliers for language travellers are formal language education providers of study abroad (SA) programmes, usually designed for specific market segments (e.g.: youth, exam-takers, business people).

Engle and Engle¹⁹ presented a classification of study abroad programmes based on seven defining components and related levels²⁰.

¹⁷ *Ibidem*.

¹⁸ Boekstein 2017.

¹⁹ Engle, Engle 2003.

²⁰ Classifications: (1) Length of student sojourn; (2) Entry target-language competence; (3) Language used in course work; (4) Context of academic work; (5) Types of student housing; (6) Provisions for guided/structured cultural interaction and experiential learning; (7) Guided reflection on cultural experience. Levels: (1) Study Tour; (2) Short-term study; (3) Cross-Cultural Contact Program; (4) Cross-Cultural Encounter Program; (5) Cross-Cultural Immersion Program. Source: by Engle, Engle, 2003.

The language programme defined by Peterson *et al.*²¹ on the basis of the U.S. education system as a subcategory of a study abroad programme, and more specifically, as a classroom study abroad programme, has the main aim of language instruction offering classroom-based courses designed for non-native students. It can be compared to a short-term study²² lasting between 3 and 8 weeks, with collective or homestay housing, in which learning activities take place in-house or in institutes for foreign students and do not comprise cultural interaction or experiential learning activities²³. Nevertheless, there has been increasing demand for tailor-made thematic programmes, and providers have started adapting them to specific needs. The traditional format consists of formal language classes in the morning and excursions, sports practice or visits to tourist attractions in the afternoon. Different activities, destinations or approaches have been introduced to facilitate connections among students and to get to know the local inhabitants and culture, or as experiential learning activities²⁴. Among the tailor-made proposals, home tuition makes students benefit from complete immersion in the culture of the host country and gives them the opportunity to gain self-confidence by continuously practicing the language: exam preparation, business communication, job interview skills or professional competences can be included in this kind of programme. Students who are planning to enter a university in the host country can participate to experience the local culture and academic systems²⁵. Language level accreditation is another important element sought by language tourists, through programmes to prepare for certification examinations.

3. *Porters' Five Forces framework*

In 1979 Michael Porter developed a framework for responding strategically to competition in an industry, based on the analysis of four forces - new entrants, suppliers, customers, and substitutes - in addition to existing competitors²⁶. More recently, the author further developed the framework: in his understanding, these competitive forces mean revealing the underlying causes or roots of an industry's current competition, and can serve in the creation of a framework useful for formulating a strategy for anticipating and influencing competition over time²⁷, as presented in Figure 1.

²¹ Peterson *et al.* 2007.

²² Engle, Engle 2003.

²³ *Ibidem.*

²⁴ Iglesias 2016.

²⁵ *Ibidem.*

²⁶ Porter 1979; Porter 1980.

²⁷ Porter 2008.

This framework has been applied to several studies analysing the tourism industry²⁸.

The Porters' forces are the following:

- New entrants present a threat in terms of pressure on prices, costs, and the rate of investment necessary to compete. This threat depends on the entry barriers for new entrants: if they are low, the threat of new entries is high and industry profitability is moderate, but if the barriers are high, especially if the existent operators are hostile to newcomers, some potential operators may think twice before deciding to become a new entrant.
- Suppliers have the power to keep the value for themselves by charging higher prices, limiting quality or services, or shifting costs to industry participants. Switching costs in changing suppliers is a problem for existing operators, above all when they have invested in specialised ancillary equipment or in learning how to operate a supplier's equipment.
- Customer buying power relates to their capacity to negotiate and force down prices, to demand better quality or more services and generally create competition among industry participants with consequences for the industry profitability. When customers or a group of customers are price-sensitive and buy in high volume, they can have a deeper influence. Customers are usually more price sensitive if the product they are purchasing is undifferentiated, if they consider it expensive and the product performance has low consequences. When the quality of the product is perceived as highly related to the price, then customers are usually less price sensitive.
- Substitutes do not always have great influence if the products or services are perceived to be totally different than the industry product. They have the potential to put a ceiling on prices. The industry should diversify itself through product performance, marketing, or other means.
- Rivalry among existing competitors is particularly destructive when only based on prices. Rivalry is higher when the number of actors in an industry is high, when the industry growth is slow, and the competitors are ambitious to become leaders. Competition based on prices is higher with consequent cuts in prices, when the buyers provide similar products and services, when the fixed costs are high and the margins low, and when the product is perishable²⁹.

The author also mentioned some factors related to the environment of the industry to be considered in the analysis but not be confused with the forces:

²⁸ Andriotis 2004; Dobrivojević 2013; Nurlansa, Jati 2016; Iturralde, Guerrero 2018.

²⁹ *Ibidem*.

growth rate; technology and innovation; government; complementary products and services³⁰.

Porter suggests that the analysis should identify products, consider the geographical scope of the competition and the level of profitability, identify the participants, analyse the forces that influence the competition and profitability, determine recent or likely future changes, and recognise the factors that influence the forces. This could lead to the creation of a strategy to compete in the market by positioning the company, exploiting industry change, shaping industry structure, and defining the industry.

4. *Background context*

In the Marche Region, according to desk research on the web run in 2019 by the authors, based on the regional official database, there are 14 Italian language and culture schools, most of which focus on teaching Italian as a general subject. In some cases, they provide courses for Italian language certifications (CILS and CELI) and special-interest courses, such as Italian gastronomy, arts and architecture, culture and traditions, refresher training for teachers, technical language courses, for example, in Italian Law, and courses for students who want to be admitted to Italian universities. Some intensive residential programmes also provide tours to farms and cultural visits in the Marches and neighbouring regions, as well as weekends in the most popular cultural destinations in Italy such as Rome, Florence, and Venice. This kind of school usually offers their students support in finding accommodation.

At the regional level, only four schools provide a combination of Italian language teaching services, accommodation facilities and tourism services. Three of these schools are located in the rural areas close to Macerata. This study presents and compares the case of two of them: Edulingua and Campus Magnolie. Table 2 presents the services provided by the two schools until 2019.

³⁰ *Ibidem.*

<i>Schools' description</i>	<i>Language teaching services</i>	<i>Tourism services</i>	<i>Accommodation services</i>
Edulingua ³¹ is a school and a training centre located in San Severino Marche, accredited as an educational body in the Marche Region in 2010, which organizes holiday-study itineraries, lessons, courses for teachers, and cultural events based on Italian language and culture teaching, which is also supported by a tour operator, Civado Tours and a real estate, Argo. The teachers also write books and design learning resources for students.	<ul style="list-style-type: none"> - 4-week long residential intensive courses with daily/weekend excursions; - thematic and tailor-made courses (cooking; art; sustainability; CILS/CEDILS certifications; work-study; preparation for accessing Italian universities); - teaching training 	<p>Services provided by Civado Tours (tour operator):</p> <ul style="list-style-type: none"> - trips included in the course package; - additional optional trips and mini-tours; - scholastic and cultural tourism; - Italian in the kitchen (farm visits; food & wine tastings); - Italian in art (guided visits to cultural sites). 	<ul style="list-style-type: none"> - shared self-catering apartments with double rooms in the town centre; - Palazzo Servanzi Confidati (historical building) with 23 bedrooms (extra charge). - agreements with hotels, B&Bs, farmhouses, vacation houses, and religious accommodation facilities in San Severino area.
Campus Magnolie ³² , in Castelraimondo was first founded by Pierpaolo Casoni in 1990 as a training school for foreign students attending the University of Camerino. In 1993 it started to combine Italian language and culture teaching with cultural visits to tourism destinations in Italy. Several companies managed the school over the years. Campus Magnolie opened in 2014, innovated its offer and improved its facilities.	<ul style="list-style-type: none"> - 4-week long residential intensive courses with daily/weekend excursions; - preparation for accessing Italian universities; - preparation for language certifications; - teachers' training; - cooking classes/events; - individual/small groups classes; - itinerant and cultural classes (included in the course) 	<ul style="list-style-type: none"> - tours included in the courses and daily/weekend excursions in the Region and in the main destinations of Italy 	<ul style="list-style-type: none"> - 36 self-catering apartments in the campus with double-rooms solutions (tot. 160 beds); - Villa Casablanca country house, also hosts cooking and art classes; - hotels and B&B solutions (extra charge)

Tab. 2. Edulingua and Campus Magnolie description

5. Methodology

In order to investigate the educational tourism industry related to the Italian language and culture schools in the Marche Region, desk research was conducted to identify the actors and the services they provide. Then, narrow-

³¹ Edulingua School official website, <<https://en.Edulingua.it/>>, 03.01.2023.

³² Campus Magnolie official website, <<https://www.campusmagnolie.it/>>, 03.01.2023.

ing the focus on the Macerata area, interviews were conducted with representatives of two of the three Italian language schools that provide both language services, tourism activities and accommodation.

This paper follows the purposeful sampling technique, which is widely applied in qualitative research because it is effective in identifying exemplary cases through a selection of individuals or groups directly involved in the phenomenon of interest and can provide information through their knowledge and experience³³.

A semi-structured interview was elaborated following Porter's five forces for industry analysis³⁴ and conducted with representatives of the schools, respectively the director of Edulingua and the administrator of the Campus Magnolie.

The interviews consisted of 21 open-ended questions divided into four sections. They were conducted face-to-face, recorded and then transcribed. The first section of 13 questions requested information about the company (history of the company, competitive advantages, services provided, activities, origin and typology of customers, collaborations, geographic scope, level of profitability), the second one of 2 questions aimed at defining the belonging industry, the third section of 9 questions was useful for understanding which forces influence competition and profitability in this field (customers, suppliers, competitors, substitutes, potential entrants), while the fourth section with 1 question asked about the factors (industry growth rate, technology and innovation, policy actions, and complementary products and services) that influence these forces and thus competition and profitability in the industry.

The content analysis resulted in a proposed framework based on Porter³⁵. It provides a preliminary overview of the educational tourism industry in the Marche Region and, more specifically, in the Macerata area, related to the potential of Italian language and culture schools offering both education and tourism.

6. Findings

The interviews revealed that the schools share a common past: 25 years ago, an Italian language school was established in Castelraimondo to support foreign students studying at the University of Camerino. Over the years, workers in this first experience went on to create other 6 schools throughout

³³ Patton 2002; Cresswell, Plano Clark 2011.

³⁴ Porter 2008.

³⁵ *Ibidem*.

the Marche and neighbouring regions. They decided to innovate the offer by providing intensive residential programmes with on-site accommodation and by creating tourism services to give students the opportunity to experience the Italian lifestyle and language in the Marche Region and in the main Italian destinations. Campus Magnolie, which remained in Castelraimondo and carried on the heritage of the first school, and Edulingua in San Severino Marche are among the schools connected to this first experience.

7. The companies and the industry

Edulingua is a collaboration of three companies: the school provides educational services and classes in Italian language and culture; Civado Tour Operator, created 5 years ago, provides transportation and logistics for the excursions; and Argo, a real estate company formed 6 years ago, handles the accommodations. Asked to identify the industry within which the company works, Giorgio Massei, the director, said there was no one industry, as Edulingua provides a number of transversal services in different sectors. Similarly, Claudio Pelagalli, administrator of Campus Magnolie, said that the activities at the campus are related to the educational, tourism and real estate sectors, and thus used Educational Tourism as an umbrella definition for the industry in which the company works. For the purpose of this study, educational tourism promoted by Italian language and culture schools is the industry of reference to be analysed, since it involves several sectors. The geographical scope of the competition is the Marche Region, specifically the Macerata area.

Both representatives said that at the national level, the industry is composed of various actors who can offer different services or even the same services but only partially. Within the industry, competition can take place among language schools that only offer courses but, in a more direct way, it happens with schools that also provide accommodation and tourism activities. The profitability in the sector is mostly related to the additional tourism activities provided, which can be 15-20% of the revenue.

Both schools employ about ten people. The Edulingua school employs three company members, six permanent contract teachers and two fixed-term teachers. Argo, the real estate firm, and Civado, the tour operator, work with around twenty employees in total, who have different kinds of contracts, among them on-call contracts for drivers and cleaners.

Campus Magnolie employs between seven and fifteen people, according to the period. There are permanent contracts for managers of the campus and the didactic aspects, the secretary, the cleaning services, and three teachers employed year-round, while the other teachers are hired as necessary with short-term contracts.

More precisely, in terms of activities, Edulingua provide courses for all the CEFRL³⁶ levels up to C1 (advanced) every month. Moreover, the thematic courses with a minimum of participants are activated several times a year. On average, in one year the school activates four or five culinary courses; two or three art courses and two or three Italian law courses.

The Edulingua director pointed out that the target market of the school is heterogeneous: the Italian language and culture course usually attracts passionate adults interested in gaining knowledge and having experiences during a visit to Italy. The culinary course draws both amateurs and professionals, especially students from foreign gastronomy schools who want to learn the technical language. Similarly, the art course is interesting for both amateurs and art history students. The technical language courses, such as Italian law, or the courses on demand in architecture and science, as well as the refresher training for teachers usually appeal to students attending specialist schools or professionals in those fields. The director added that in language learning for specific fields, practice is needed to build up the student's command of the vocabulary step by step, working through a series of specific objectives.

The Campus Magnolie administrator said that the Italian language and culture course is always active from January to November, and attracts clients ranging from 14 to 60 years old who want to visit Italy and learn the language. Their main motivation for travelling is the desire to get in direct contact with the Italian culture through hands-on activities. For this reason, the activities in the intensive programme include a day a week dedicated to an itinerant lesson in some small local villages or at the market, to stimulate students to interact with local people and practice Italian, but also to help them experience the difference between small-town life and that of the big cities they visit on week-end excursions. Since 2018, the Campus Magnolie offer has also included preparation courses for students desiring to enrol in Italian universities, and the "CampusLAB" for teachers. In one year, seventy-five Italian language and culture courses and eight university preparation courses are usually activated.

8. Competitive advantages and profitability

Edulingua's school director said their distinctive advantage is the quality of the education offered, as the school was founded by teachers whose primary passion is their educational mission, even before that of entrepreneurship. They apply a variety of methodologies in the classroom to best meet the needs

³⁶ European Commission, Common European Framework of Reference for Languages (CE-FRL), <<https://rm.coe.int/1680459f97>>, 03.01.2023.

of their target customers, emphasise the learning context, and develop and provide high-quality teaching tools.

A second aspect highlighted is the importance of networking as a marketing strategy for building loyalties and reaching new potential customers. They maintain a direct relationship with other teachers in the world, shore up existent connections through events and through the worldwide sale of their books and manuals for learning and teaching Italian, and work to create new contacts with universities and educational bodies.

The Campus Magnolie, whose mission is to welcome people from a number of countries to facilitate Italian language learning, offers two competitive advantages. First, classroom activities take place in the same building as accommodation and the administrative offices, so these aspects are more easily managed. Second, they have a rich offer in tourism activities, as their packages include several daily or weekend excursions, and they also offer the option of more visits to the Marche or to other regions on request, at an extra charge. Their marketing strategy targets students attracted by packages for both language courses and numerous tourism activities and sets more competitive prices than those of their competitors; this focus on extra tourism services bolsters the company's income.

For both schools, profit mostly comes from tourism services. The Edulingua director noted that the most interesting percentages in terms of profitability are related to tourism activities in the strict sense. Nevertheless, he added that this could not happen without the school's good offer of high-quality courses, which provides the right visibility to attract educational tourists. The Campus Magnolie administrator also agreed that their profitability is mostly related to the tourism activity offered. They choose to set lower costs for courses and accommodation than those proposed by other competitors, in order to attract a higher number of customers, and thus their profit comes from the additional tourism activities offered. According to him, high numbers do not always mean a better profitability percentage: it is important to create a balance between the cost of suppliers, the numbers of customers and the revenue from the services sold, which means that they have to manage the bookings well. Through customization and flexibility in the offer, the company works to earn the loyalty of its clients.

9. Relationships and collaborations

Both Edulingua and Campus Magnolie have agreements with universities abroad to offer their students Italian language and culture courses that the university will recognize with credits. Edulingua highlighted relationships with universities in the U.S., Russia and Lebanon, while Campus Magnolie has agreements with universities in the U.S., Russia and Colombia.

Both companies indicated that they value networking with local universities. Edulingua has a strong relationship with the University of Macerata, with whom it has an agreement for the provision of human resources for teacher training courses, research and marketing activities. Through the university, the school is also able to recruit teachers to employ. In general, schools like Edulingua and Campus Magnolie also activate special interest courses according to the learning needs of the local universities, in the context of master's programmes in didactics or scientific Italian courses, and thus university students are their clients. Edulingua runs short projects with the University of Camerino. It has agreements with Ca' Foscari University in Venice for a teacher training course, and the University of Siena for official certifications. For its part, Campus Magnolie has a stronger relationship with the University of Camerino (UNIMCAM), with whom it has an agreement providing discounts to students attending Italian language courses. Moreover, in 2016, when earthquakes damaged UNICAM dormitories, the Campus hosted foreign students who needed accommodation. The school also organised an international teacher training course in collaboration with teachers from the universities of Camerino, Modena, Pisa, and other cities.

Both Edulingua and Campus Magnolie are particularly interested in offering students, opportunities for direct contact with local communities (respectively San Severino and Castelraimondo), and direct their students to local restaurants, grocery stores, and other services with whom they have formal and informal agreements. The daily excursions are organized in nearby villages and cities such as Macerata, Civitanova Marche, Loreto, and Fabriano. In particular, Campus Magnolie usually organises its itinerant lessons in the nearby villages of Gagliole and Pioraco, where they visit local museums, farms, wineries and restaurants. For their weekend excursions to larger cities such as Rome, Florence, and Venice, but also to Northern Italy and the regions of Apulia and Sicily, they choose to hire local guides. Both schools employ local suppliers for transport, cleaning services, advertising and promotional materials.

10. *Results*

Both Edulingua and Campus Magnolie are educational tourism providers specialised in the language tourism sector³⁷. The schools offer Italian language and culture courses as a core service, but as Edulingua is particularly concerned about the high-quality provision of the language teaching services and Campus Magnolie considers the variety of tourism activity provided to students as a distinctive

³⁷ Laborda 2007; Iglesias 2016; Boekstein 2017.

advantage, it is possible to distinguish them, respectively, as «education first» and «tourism first» experience providers³⁸ albeit with similar programmes and activities. In fact, both schools promote educational and tourism services in a formal and non-formal learning environment³⁹ including wine and gastronomy experiences, cultural, natural and discovery experiences, and participation in local events. Their relationship with local communities is an important and strong aspect of their offer, an element of educational tourism underlined by Iglesias and Boekstein⁴⁰. It also represents an opportunity for growth in rural areas, with advantages for the local companies (e.g.: restaurants, small museums, grocery stores, other service providers...) involved in the collaboration with the analysed schools and a fruitful occasion for reciprocal cultural enrichment and exchange between tourists and local communities. For example, Campus Magnolie organises visits to the local market to provide opportunities for students to practice Italian and immerse themselves in the local daily life, as well as visits to local museums and small villages in the Region. These schools offer traditional short-term classroom study abroad programmes⁴¹ which normally provide language and culture classes in the morning and daily excursions in the afternoon⁴² with week-end trips in the main Italian destinations. They also pay attention to the accreditation aspect and provide tailor-made services according to the specific learning needs of their customers.

Edulingua, Campus Magnolie and two other schools stand out from the rest of the Italian language schools in the Marche Region because they provide full packages combining an educational (Italian language and culture courses) and a travel component (accommodation and tourism activities).

Porter (2008)'s suggestions have been applied in interviews to collect data about the Marche Region educational tourism industry focused on Italian language and culture. The following sections report the results from parts 2, 3 and 4 of the interviews, namely, defining the industry, defining the forces influencing competition and profitability in the industry, and defining the factors influencing profitability and competition in the industry.

11. *Applying Porter's Five Forces to the educational tourism industry in the Marche Region*

The school representatives were asked to identify the actors representing the forces positively or negatively shaping competition and profitability in the industry.

³⁸ Ritchie *et al.* 2003.

³⁹ Sie *et al.* 2016.

⁴⁰ Iglesias 2016; Boekstein 2017.

⁴¹ Engle, Engle 2003; Peterson *et al.* 2007.

⁴² Iglesias, 2016.

11.1. *The buyers*

According to the interviewees, Italian language and culture schools in Italy mainly attract students from the U.S., Japan, Germany, France and China. In particular, many U.S. university students choose Florence as a destination. In the Marche Region, some schools attract students from specific areas, such as Central and South America, but also customers from the U.S. and Northern Europe. Schools in the Macerata area have many Chinese students interested in enrolling in Italian universities. The Ancona area draws many clients from Germany and Switzerland. The Marche Region educational tourism programmes advertise to Italian associations abroad, Italian language and culture schools abroad, and universities and colleges that prefer to offer their students experiences in the Region's lesser-known destinations, as the prices are lower, but students can nonetheless visit the main tourist attractions. Both companies attract about one thousand students a year, on average. For both companies, the customers come mainly from such Central and South American nations as Mexico, Brazil, Colombia, Peru, Argentina and Costa Rica, but both companies also have contacts in Europe and North America. For example, Edulingua provides a course on Sustainability for Arizona State University, with students usually coming to Italy at the beginning of the summer season. Its European customers mainly come from Spain, Germany and Belgium, and it has some connections with Australia, Russia and Lebanon. Campus Magnolie is working to attract customers from Australia and already have contacts with U.S. universities, through direct contact with professors teaching there. Campus Magnolie European customers come from Spain, the Netherlands, Finland, Iceland and the European side of Russia.

11.2. *The suppliers*

In general terms, in the Marche Region, suppliers to educational tourism businesses are:

- publishing companies, which provide the learning materials and which, in the case of Edulingua, directly collaborate with the school to create manuals and books to be sold worldwide;
- transportation services: Edulingua works with Contram, a bus company based in Camerino that provides local public transportation as well as busses for hire for longer journeys, and transportation from the main airports to San Severino Marche; Campus Magnolie works with a local transportation company in Caldarola with a semi-exclusive agreement;
- hospitality facilities: even though both schools provide their own housing for customers, they also give students the opportunity to choose different accommodation at an extra charge, and have established agree-

ments with local B&Bs, hotels and country houses. In the Marche Region, not all the schools provide accommodations to students, and thus work with external hospitality facilities;

- catering and dining services: customers of Edulingua and Campus Magnolie arrange for their own meals, but upon request a canteen service can be arranged. Other schools in the Marche Region generally outsource these services for their customers;
- cleaning services: while Edulingua and Campus Magnolie have their own cleaning staff, other schools sometimes outsource these services;
- advertising and marketing agencies, suppliers of merchandising gadgets and advertising materials;
- agencies for finding customers: these services are commonly used by schools that do not directly create their own network. In contrast, Edulingua and Campus Magnolie build their own relationships with potential customers autonomously.

According to both school representatives, universities play an important role in the educational tourism sector as suppliers. First, in terms of services and products, the university together with the schools build educational services and products. For example, new quality products based on new models and methods are created through PhD scholarships co-funded by the companies and the university, in which recipients engage in cutting-edge research and development. The university can also be a supplier in terms of human resources. For example, universities supply specialised teachers for the school's special interest courses, such as refresher training for teachers. Universities can also be seen as suppliers of customers, providing new students for the school.

Moreover, a collaboration between schools and universities can create new experiential activities for school customers, through the international networks of the universities and the possibility of accreditation.

11.3. *The existing competitors*

According to both schools, the Educational Tourism industry related to Italian language and culture schools is a growing sector which can be threatened by other schools providing similar services in other regions of Italy, potentially attractive from a cultural and touristic point of view. The Edulingua director mentioned schools in Cilento, Bari and Abruzzo areas as potential competitors, but said they do not really feel threatened by them because of Edulingua's focus on the quality of their courses. He pointed out that while other schools were founded by entrepreneurs mainly interested in profit, the Edulingua founders are school teachers with a strong vocation for excellence in didactics who later became entrepreneurs and thus combine these two

souls in the same activity. As a consequence, competition could perhaps arise in terms of prices or other aspects that are not specifically linked to the values behind the offer. However, they feel less threatened by their competitors because Edulingua has the advantage of having built and cultivated relationships with customers over the years, and their passion and excellent services have become a guarantee. Word-of-mouth recommendations bring them many new customers. In fact, many of their students are return customers. Instead, the administrator of Campus Magnolie noted that their most direct competition comes from schools whose founders started in Castelraimondo and then moved elsewhere in the Marche and other regions. Thus, they have the same kind of contacts with customers built from the beginning. The direct competitors of Edulingua in the Marche Region are the Macerata area schools with whom they share a starting point and a common path. On the national level, the competition is with firms that offer similar services, such as teacher training, or that draw clients from the same countries. Edulingua offers lower prices than other schools in the national market, but higher prices than those of other Marche Region schools, as it focuses more on the quality of the services than on the number of customers. The competitors for the Campus Magnolie are the other regional schools offering similar services, above all those in the Macerata area, but they also think about competitors in other regions such as in Apulia, Calabria and Tuscany. As is the case with Edulingua, the competition is based on the similar provenience of the customers. Even though the agreements and the contacts are different, the countries are the same, mainly from Central and South America, whose people prefer to travel in groups.

11.4. *The substitutes*

The representatives of both companies conceded that, since educational tourism is a transversal industry embracing sectors of education, tourism and real estate, it is not difficult to find potential substitutes. Hospitality facilities, such as country houses, could potentially offer workshops or short courses on wine and gastronomy and local culture in the Italian language.

11.5. *The potential entrants*

According to both interviewees, potential entrants are tourism operators, hospitality facilities, or new Italian language and culture schools that are widening their horizons by considering the opportunity to branch out into educational tourism. This kind of activities could create an opportunity for themselves by restoring and using abandoned historical villages or buildings.

11.6. *Forces influencing the industry*

After the interviewees identified the actors involved in the industry, they were asked about rivalry among existing competitors, the bargaining power of customers, the bargaining power of suppliers, the threat of new entrants and the threat of substitute products or services⁴³ as forces that could positively or negatively influence competition and profitability in the sector.

The Edulingua director said potential new entrants could be a threat if they tried to enter the market with prices that undercut Edulingua's, rather than creating a competitive advantage through a niche offer or through superior marketing. If there were to be a price war among the schools, it would lead to a general impoverishment of the sector because all the schools would have to reduce the quality of their services in order to stay in business. The director said they face this potential competition with the completely opposite strategy, having chosen to raise their prices even when it might have caused them to lose some clients; they opted to confirm their image of a quality school. This actually led to higher profit and the opportunity to enter new markets.

The Campus Magnolie administrator said that the educational tourism industry in the Marche Region could be affected by price competition among rival schools and the bargaining power of customers. Customers of schools in the Marche Region and, in particular, the Macerata area, come from much the same areas. Students from Central and South America give importance to the price and for this reason schools choose not to raise prices in order not to lose customers. A solution could be to focus on new markets and niches that can afford higher prices.

According to the interviewees, changes in one of the forces can affect the actions of other forces. The Edulingua director pointed out that the arrival of new entrants could affect rivalry among current competitors, because it would lead to an overabundance of services and products, impacting prices and provision of services. This could also have an impact on the choice of customers and enhance their bargaining power for optimum prices. The Campus Magnolie administrator noted that a change in the marketing strategy and networking activity could somehow change the relationships between supply and demand, observing, like the Edulingua director, that this could affect customer choice, given greater bargaining power, and intensify rivalry among current competitors.

Instead, speaking about the bargaining power of suppliers, both companies agreed that their choices to hire their own in-house staff for strategic services such as administration, teaching and cleaning, and only outsource a few services, such as transportation, gives stability to the educational tourism companies and creates solid relationships with the local area, reducing the potential bargaining power of suppliers.

⁴³ Porter 1979; Porter 1980; Porter 2008.

11.7. *Factors influencing Porter's forces*

The external factors of industry growth rate, technology and innovation, policy actions, and complementary products and services can potentially influence the behaviour of the above-mentioned forces, shaping the educational tourism industry in different ways. According to the director of Edulingua, the rapid changes in communication technology and the massive use of social media in marketing strategies gives visibility above all to new entrants who can be more aggressive in their advertisement, with cheap promotional offers. Virtual communication, more than traditional media, allows real-time interaction with customers and immediate connections in a larger geographical area. On the one hand, this can be threatening for the companies already affirmed in the market, but, on the other hand, this change can be an opportunity for them to be proactive in using new tools to upgrade their offer, for example by organising webinars and MOOCs for both education and marketing reasons.

Both representatives of Edulingua and Campus Magnolie pointed out another influential aspect: the factors related to economic changes in the countries of their students. For example, currency devaluation or economic crisis could make the cost of travel prohibitive for customers, such that they would not come at all, or would be forced to choose the least expensive language school, which would have an impact in terms of competition among schools. Schools have devised creative responses to such situations. For example, to meet the needs of Brazilian customers, the Campus Magnolie allowed them to pay in advance by instalments, thus avoiding the risk of unfavourable changes in exchange rates that could force them to sacrifice travel. Another economic factor that could negatively impact the industry could be unfavourable policies of the Ministry of Education or the Ministry of Foreign Affairs of Italy or the countries of origin of the customers, such as cuts in public funding for language teaching or for scholarships. Also, the Italian Ministry of Education could conceivably impose specific taxes on businesses that open new language schools or other such initiatives.

In a situation of economic crisis, some companies may choose to offset the loss of their traditional customer base by moving into the territory traditionally seen as the market of other companies, establishing contacts with the customers of their competitors and trying to “steal” them.

According to the Edulingua director, one way to face this kind of risk related to external factors can be to build strong relationships and propose new ideas and opportunities for collaboration in the local area. To summarise, Figure 2 shows the application of Porter's framework to the Educational Tourism Industry in the Marche Region, showing which forces interact in the industry, which changes in one force could influence others and which factors have a potential impact on the forces.

12. *Conclusions*

The objective of this paper was to investigate the forces and factors influencing the competition of the Educational Tourism Industry in the Marche Region, by exploring the perspective of two of the three Italian language and culture schools in the Macerata area that provide participants with both tourism activities and on-site accommodations. Following Porter's framework (1979; 1980; 2008), the geographical scope of the competition was identified as regional, that is, the rural area around Macerata in the Marche Region. Profit in the sector comes not so much from the Italian language and culture courses as from the tourism activities included in the package. Information about the companies, their respective competitive advantages and performance, and their relationships and collaborations proved useful for learning about the context and the market in which they work. Both representatives of these schools highlighted a key element: the importance of building good relationships and collaborations with local stakeholders in order to reciprocally benefit from existing and future opportunities for growth and local development. The interviewees particularly highlighted this aspect in the context of describing strategies for facing their competitors and the bargaining power of suppliers, and for dealing with external factors, such as economic disadvantage in Italy or in the school itself or in the countries of their customers. In this context of relationships, local universities, considered both collaborators and suppliers, can play a significant role.

In the results section, Porter's framework related to the educational tourism industry in the Marche Region was applied and discussed. The aspects that emerged are illustrated in Fig. 2, which shows some interesting aspects. First, it emerged that changes in one force, such as a new entrant in the competition, can influence another force, the bargaining power of customers, because the new entry causes an overabundance of similar products and services, and thus impacts the rivalry among existing competitors, who deem they must lower their prices and try to make their services more attractive. Second, the behaviour of the forces, particularly the rivalry among existing competitors, is influenced by changes in external factors, such as economic crisis and currency devaluation in the target countries, taxes and cuts in public funding for education in both Italy and the target countries, and rapid changes in communication technologies, which influence the advertising and marketing strategies of the schools. The representatives of the companies said they face competition and manage profitability in a number of ways. They stressed the vocational passion of their teachers, the quality of the services they provide, their attention to network building, the rich variety of tourism activities offered, the relationships built locally, and their competitive prices that balance quality and economic advantage. Finally, their commitment to establishing collaborations at the local level and their engagement in promoting the immersion of tourists in the life of rural areas (visits to villages, local markets, restaurants, grocery

stores, etc.) makes these schools represent an opportunity of growth for the involved firms and businesses and a further occasion of exchange and multiculturalism between tourists and locals.

This study presents some limitations: it does not present a complete overview about the whole regional Language Tourism Supply. Even though the companies interviewed exemplify many aspects of the language tourism industry⁴⁴ in the Marche Region in their combination of the educational component and the tourism one, further research could be conducted with the other schools in the regional market, using qualitative and quantitative methods to achieve a more complete overview of the context, deeper knowledge about the performance of the companies and a clearer idea about the forces shaping competition in the Marche Region. Moreover, as Porter's framework helps in the elaboration of a strategy for companies in order for them to compete in the educational tourism market, once the framework is completed, further research to devise a strategy for each company could be done. Finally, data were collected in 2019, before COVID-19. Further research could be done to update and expand the study by considering how the pandemic influenced and impacted the framework that emerged from the case.

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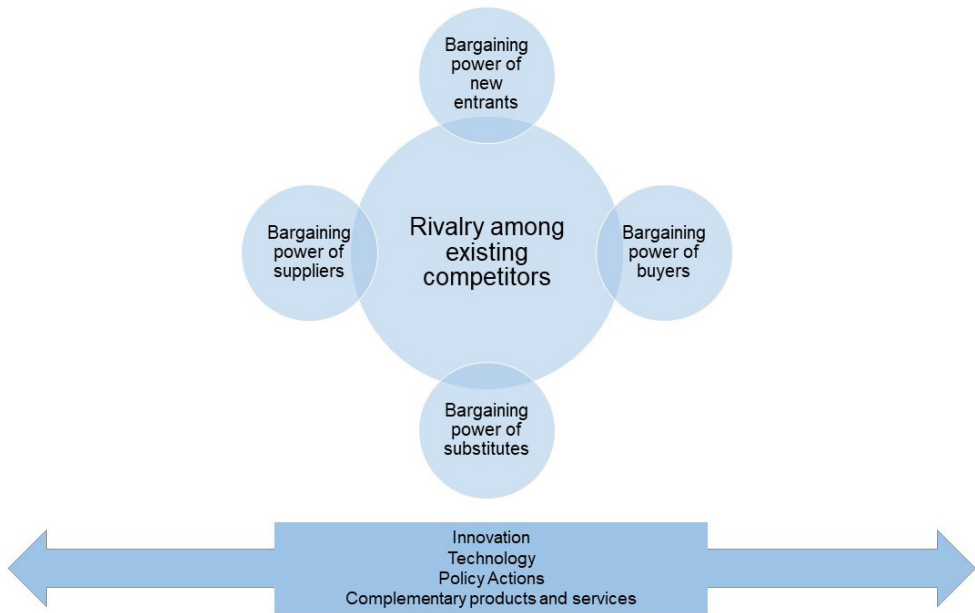
Appendix

Fig. 1. The Five Forces and factors that shape industry competition (Source: Porter 2008)

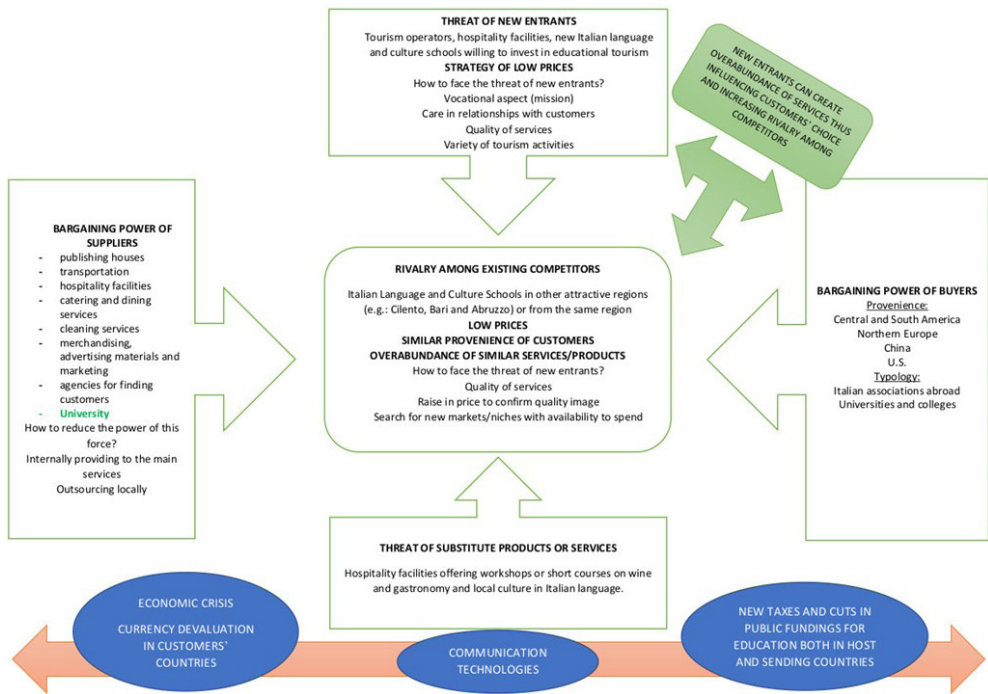


Fig. 2. Porter's framework applied to educational tourism industry in Marche Region

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