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Tourism Policy Practices and Options

WP8 Intermediate Report for the EURODITE WP8 policy cloud meeting in Brussels 23-24-September 2009

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WP8 Intermediate Report: Tourism Policy Practices and Options

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1. Introduction

The aim of this paper is to analyse policy practices and options as a contribution to policy scoping within WP8 on the basis of the revised WP8 policy cloud *Outline and Template for Analysis* (version 8.7.09), and incorporating comments from the meeting in Brussels 30-31 June on the pilot version.

The text has been produced in four steps. First relevant policies have been identified by reading the two WP5 reports (preliminary, final) and the WP6 report for each of the regions where tourism-related activities have been the focus of study. Then a detailed analysis of the policies has been undertaken by revisiting especially the WP6 reports and organising notes according to the analytical dimensions in the *Outline and Template for Analysis*. On the basis of the tabularised notes the draft pilot version of the report, using the WP3 tourism report to provide additional background and the WP1c analytical framework document to further clarify the policy typology employed. Subsequently the text has been revised and extended on the basis of comments from the WP8 policy cloud meeting in Brussels 29-30 June, and input from the authors of the WP5/6 reports on tourism. Few direct references to secondary literature are used, these can be found in the relevant *EURODITE* reports listed in the bibliography at the back.

2. Policy contexts

Tourism is an economic activity which involves a vast array of stakeholders inside and outside the tourist destination itself, including some for which non-local service users constitute a minority at least outside the main tourist season. With the *EURODITE* focus on knowledge processes at different organisational and territorial scales, the precise delimitation of the sector is, however, no major issue in itself; rather it is an important point in its own right both in terms of knowledge dynamics and public policy that tourism-relevant facilities are also used for other leisure or work purposes. From a policy perspective it is more important to distinguish between different types of tourism on the basis of why and how tourism occurs:

- The *attraction* that generates tourism activities (the 'reason-to-go) can either be natural or cultural, and this has important implication for policy makers: while the former can 'only' be used by being made accessible to potential visitors (e.g. through infrastructure, information, branding), the latter can also be produced from first principles (e.g. events, exhibitions, meetings).

- The *organisation of travel* can be either undertaken collectively and professionally by e.g. tour operators for holidaymakers or firms for their employees, or planned and executed by individual small groups of e.g. families or friends. Also this distinction has important policy implication with regard to how demand for particular services can be increased because the buyers of products within a particular destination are either corporate/professional or private individuals.

Table 2.1. Drivers and organisation of tourism: Examples, critical resources and EURODITE case studies

		Attraction	
		Cultural	*Natural*
Organisation	*Individual*	*Typical example:* City breaks *Critical resources:* Access, activities *Cases studies:* Ruhr heritage, Ystad film, Antalya branding, North Jutland museums	*Typical example:* Coastal/rural destinations *Critical resources:* Local networks *Case studies:* Achterhoek rural, North Jutland DMOs
	Collective	*Typical example:* Corporate seminars *Critical resources:* Access, activities *Case studies:* Antalya football	*Typical example:* Package tours *Critical resources:* Tour operators *Case studies:* Antalya coastal

Taken together (Table 2.1), this creates four basic forms (or sub-sectors) of tourism with different combinations of attractions and organisations and hence very different critical resources that needs

to be present in order for a particular form of touristic activity to function. From the perspective of public policy this is of course crucial because these critical resources must be present and adequate order to develop a particular form of tourism, and hence tourism policies are likely to differ in focus according to the nature of the socio-economic activity targeted. Consequently, policies are also likely to differ in terms of their implications for knowledge dynamics, because different types of knowledge are likely to be critical for different forms of tourism. While symbolic knowledge about trends in visitor preferences is of course important for any provider of tourism services, it is obvious that knowledge about organisation of networks is crucial in coastal/rural destinations, knowledge about development of new products and transport services important for tourism activities based on cultural attractions, and knowledge about the organisation and strategies of tour operators pivotal for the development of package tour activities. Through a combination of luck and design, the tourism-relevant case studies undertaken within *EURODITE* contain examples of all of the four basic forms of tourism, and therefore we are also likely to find a useful variety in terms of policies aiming to promote tourism development.

The case studies are undertaken in European tourist destinations[1] that are part of regions with rather different socio-economic profiles, as demonstrated by the WP4 classification: Antalya/Turkey resembles the Italian textiles profile, North Jutland/Denmark and Achterhoek/The Netherlands belong to the north scientific profile, the Ruhr area to the German high-tech profile, and Skaane/Sweden to the north high-tech profile. Although the unsurprising contrast between the Turkish case on the one hand and the more knowledge-intensive regions from the north-west of Europe on the other is of course noticeable, the importance of the distinction between the latter on the basis of the general WP4 indicators on science, technology and education is less certain. It is well-established that product development in tourism, not just in SMEs but also among large attractions and tour operators, is largely incremental, rarely involves specialist staff except through the use of more or less specialised KIBS with regard to e.g. provision of market intelligence (cf. the WP3 tourism report), and because of the low-competence, low-status image of the sector, the development of specialist education for tourism and hospitality at all levels is not necessarily in line with more general national trends. In the case of tourism it is therefore relevant to introduce additional measures of the territorial context of this socioeconomic activity based on sector-specific data.

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[1] Only mountain tourism (skiing) and CEE destinations are missing in order to cover the primary geographical settings of tourism in Europe.

As illustrated by Figure 2.1, tourism has a very uneven geography, something which is extremely important not only from an economic and socio-cultural perspective, but also in terms of policy implications. While Turkey belongs to the group of recipient countries where international tourism plays a significant role as a generator of income and outbound travel only engaged in by local citizens to a limited extent, the three other belong to the group of generating countries where international tourism plays a significant role in society with expenditure by citizens above the EU average but which are less important as destination for foreign tourists, with Denmark closest to and Germany furthest from the EU average in receipts from tourism. The policy implications of this are, however, less clear: while tourism is obviously important in Turkey, recent success may lead to either political complacency or attempts to reduce/regulate activities, and the more limited importance of incoming international tourism in the three other countries may either make it difficult for tourism-related issues to get on the national policy agenda or stimulate intense attempts to catch up.

**Figure 2.1. International tourism in Europe.**
Source: Calculated on the basis of World Tourism Organisation 2008.
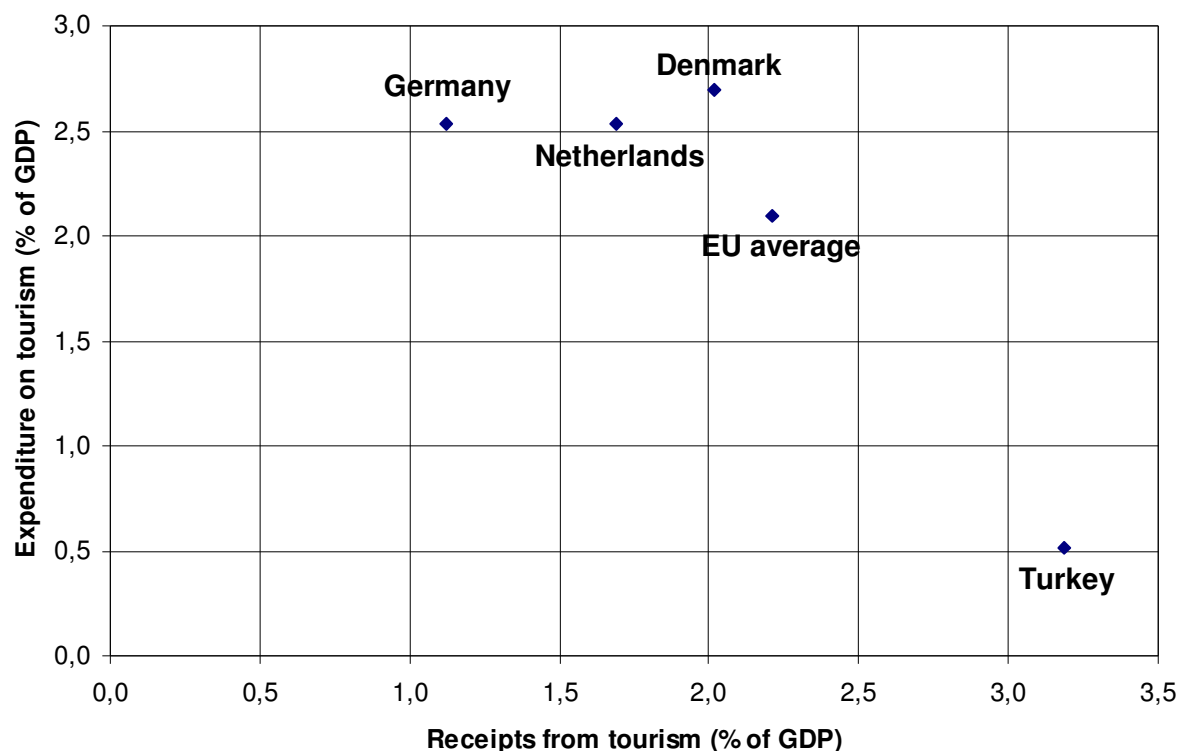
In practice, however, tourism tends to be concentrated in particular destinations, and hence tourism policy often has a very strong regional/local component, and the four *EURODITE* case

studies are also spread out in this respect, with two regions (Antalya, North Jutland) being the prime summer holiday regions of their respective countries, while tourism in Ruhr is an emerging activity in terms of its relative importance in the regional economy, and rural tourism in Achterhoek, although emerging, has already achieved a considerable presence in terms of the relatively density

Figure 2.2. Butler's destination life cycle. *Source:* Weaver & Lawton 2002.
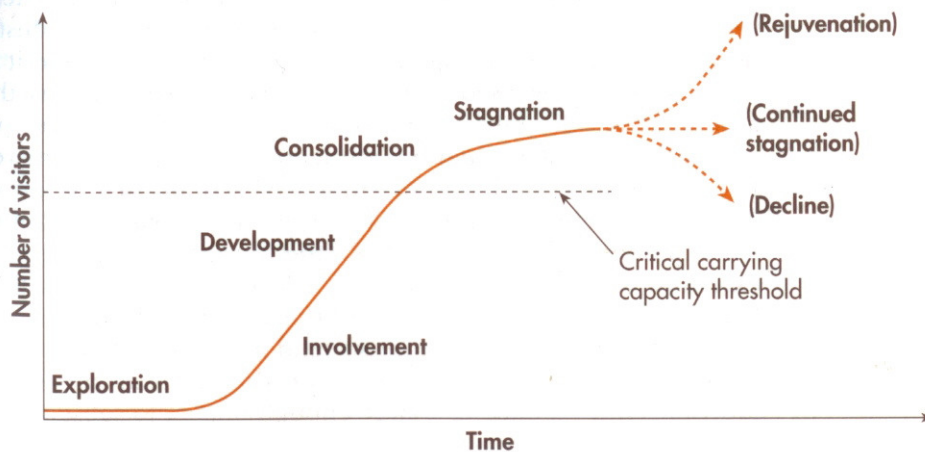
of commercial accommodation available. Translated into the terms popularised by Butler's destination lifecycle ideal types (Figure 2.1), North Jutland is a stagnating destination, Antalya in the late development or early consolidation stage, and both Achterhoek and Ruhr in the early involvement stage. It is therefore interesting to note that nonetheless tourism has become a salient item on the political agenda in all four case study regions, surrounded by a fairly widespread consensus about the need to expand tourism as an economic activity even though this may require more or less extensive adjustment of the tourism experiences currently being offered to visitors. However, it is also worth noting that while in the two well-established tourist regions, Antalya and North Jutland, the driving force behind initiatives is dissatisfaction with the existing tourism (too few or the wrong kind of visitors), the driving force behind tourism initiatives in the two other regions is essentially non-touristic, i.e. declining economic activity in traditionally dominant sectors. In the latter cases tourism becomes a harbinger of wider social changes and hence potentially associated with positive or negative symbolic value that may affect tourism policies by making them too optimistic (tourism as the no. 1 carrier of hope for a better future) or too inward-looking (attempting to reinstate relics of e.g. an industrial past with no clear idea about its attraction to potential visitors). In short, and perhaps even more than other public policies, tourism

development initiatives are not only about tourism, and hence from a technocratic/analytical perspective they are therefore less likely to achieve their professed goals.

3. Current tourism policies

The policies that are present in the case studies are summarised in Table 3.1, and, unsurprisingly, initiatives relating to touristic activities where the central attraction is cultural – from art and history to leisure activities and architectural heritage – are well represented among the total of ten policies. It is worth noting that all of these policies are currently in existence, although case study authors occasionally point out that more extensive efforts in a particular area would be preferable, and as such the WP5 and WP6 reports do *not* themselves identify additional tourism policies, either initiatives which have been terminated or never introduced. The identification of additional options will in other words depend on combining the analysis of key policy dimensions of existing policies with the key knowledge dynamics identified in WP3.

Table 3.1. Policies explicitly present in case studies by type of tourism

		Attraction	
		Cultural	**Natural**
Organi-sation	**Indivi-dual**	*IC-1:* Branding of Antalya as a cultured city through a combination of place marketing and sea-front redevelopment *IC-2:* Development of Ruhr industrial heritage visitor trail through networking *IC-3:* Development of Ruhr football visitor trail through networking *IC-4:* Development of film-based tourism in Skaane through marketing of new cultural assets *IC-5:* Development of North Jutland museums through network of new-media based experiences	*IN-1:* Development of rural tourism in Achterhoek through training and advisory services *IN-2:* Extension of season in North Jutland through DMO network *IN-3:* DMO development in North Jutland in order to promote all-year tourism
	Collec-tive	*CC-1:* Development of football training tourism in low season in Antalya through infrastructure	*CN-1:* Development of coastal tourism in Antalya through access to land for hotel construction and place marketing

Given the character of tourism as a 'long-distance service', ordered or planned well in advance of consumption far away from its eventual destination, tourism policies are typically geared towards affecting either the core experience that attracts tourists to a particular destination, or the way in which this experience is communicated to potential tourists, by maintaining service offers and/or communication as they are or by promoting more or less extensive changes. Table 3.2

summarises the options available and the distribution of the *EURODITE* case studies, and it is immediately evident that the main strategic focus of the policies has been product development. Although marketing strategies also occurs in relation to well-established tourist destinations, comprehensive branding strategies only occur in cases where comprehensive changes to existing services are linked to attempts to change external perceptions of the destination as a whole (Antalya, Skaane and Ruhr becoming places of culture rather than, respectively, sun-fuelled hedonism, rural idyll, and industrial grind). While the low-profile or indirect nature of service strategies probably explains why experience facilitation is not well-represented in the case studies (in Ystad/Skaane tourist information about film locations was prompted by visitor demand), the limited emphasis on marketing strategies is likely to reflect the fact that marketing of destinations has traditionally been the most prominent strategy within tourism policy and hence less likely to attract the attention of *EURODITE* researchers, although e.g. new ways of using the internet could also have been an obvious candidate for case studies. Likewise the focus on innovation strategies rather than branding does not necessarily imply that the new services have not been marketed, it merely implies that the new tourism experiences have tended to be niche products which have not (yet) lead to more extensive efforts to associate the destination as a whole with the new form of tourist activity. Still, the emphasis on developing new tourist experiences rather than new forms of communication raises the question about the extent to which these new attractions reflect documented trends in tourist demands or are speculative producer-driven initiatives, something we will return to in section 4 below.

Table 3.2. Tourism policy: Strategic aims

| | | Communication | |
		Continuity	Change
Service/ experience	**Conti-nuity**	**Service strategy (experience facilitation)** *Typical example:* Improve transport links or on-site information services in order to make services more easily available to visitors *EURODITE cases:* IC-4	**Marketing strategy (improved use of capacity)** *Typical example:* Improve brochures, TV commercials, websites, public relations to bring in more tourists similar to existing visitors *EURODITE cases:* CN-1, IN-2
	Change	**Innovation strategy (product development)** *Typical example:* Support development of new services to appeal to new customers *EURODITE cases:* CC-1, IC-3, IC-4, IC-5, CN-1, IN-1, IN-2, IN-3	**Branding strategy (market repositioning)** *Typical example:* Combines new products with new communication strategies to reach new customers *EURODITE cases:* IC-1, IC-2, IC-4

A crucial question in public policy is how general aims are translated in specific objectives for change, i.e. who/what is going to change in which way as a result of public intervention in order to e.g. attract a different kind of tourists. Table 3.3 summarises the nine basic options, and it is immediately obvious that the *EURODITE* case studies comprise the complete range of both target institutions and capabilities. At the same time it is also clear that while some policies concentrate on bringing about one particular form of change – e.g. networks between specialised football attractions – others involve a series of coordinated changes, e.g. infrastructure and marketing in the re-branding of Antalya, a combination of regional funding for film projects and targeted international marketing of Skaane as a destination for specialist cultural tourism, or a combination of IT-investment, staff training and networking in order to integrate North Jutland museums in the experience economy. As in other areas of economic activity where micro-firms are important, it is difficult and perhaps not always relevant to distinguish between 'individuals' and 'firms' as the institution targeted by policy, but while the presence of more or less comprehensive policy measures is hardly surprising, from a policy scoping perspective it is more interesting to focus on what is *not* being targeted.

Table 3.3. Tourism policy: Targets of change

		Target capabilities		
		Hardware	*Software*	*Orgware*
Target insti-tutions	*Indi-viduals*	*Typical example:* Attraction of qualified labour *EURODITE cases:* Absent	*Typical example:* Training of employees, marketing to visitors *EURODITE cases:* CN-1, IN-1, IN-2, IC-1, IC-4, IC-5	*Typical example:* Creation of professional network *EURODITE cases:* Absent
	Firms/ organi-sations	*Typical example:* Investment promotion *EURODITE cases:* CN-1, CC-1, IC-4, IC-5	*Typical example:* Advisory services *EURODITE cases:* CC-1, IN-1	*Typical example:* Creation of network between attractions *EURODITE cases:* IC-2, IC-3, IC-5
	System	*Typical example:* Infrastructure improvement *EURODITE cases:* CC-1, IC-1, IC-2	*Typical example:* Development of knowledge institutions *EURODITE cases:* Absent	*Typical example:* Creation of RDA or cluster organisation *EURODITE cases:* IN-2, IN-3

Firstly it should be noted that in the vast majority of case studies policies focus directly on what is traditionally seen as critical resources in the type of tourism targeted: either directly (provision of new activities for city breaks, infrastructure for incoming football teams, networks/organisations to link/support small service providers) or indirectly (land for speculative provision of hotel capacity to attract internationally foot-loose tour operators). The only case in

which current policies appear to have focus on other targets than the critical resource associated with the type of tourism involved is in Achterhoek where creation of networks between providers of rural tourism has been given less priority than training and advising individual providers.

Secondly it is also interesting to note that three possible targets of public tourism policy were not present at all, despite their obvious relevance for some of the development strategies pursued:

- increasing the number of individuals with relevant skills available through attraction of specialist labour was clearly relevant in Antalya to support the growth in tourism from especially Russia,

- development of knowledge institutions in order to support tourism development would have been relevant in both mature (North Jutland, Antalya) and emerging (Ruhr) destinations, and

- creation of professional networks between tourist employees have not been a major priority in any of the case studies, although it might have furthered acceptance of change in e.g. the North Jutland museums.

In the two first cases it could be argued that this problem has to some extent been addressed by other actors (hotels, tour operators, universities, museums), and the role of public policy would merely have been to improve the quality or quantity of new staff, training courses, etc. In a situation with increasing competition between destinations, timing and quality– getting new services right before competitors – is, however, of great importance, because customer satisfaction and excitement is an important part of the creation of the image of destinations. In short, supporting existing development trends by working 'with the grain of the market' is perhaps particularly important with regard to tourism, but the three examples above underline both the importance of involving a wide range of partners also outside the tourism sector itself, and also to take into account the possibility that not all targets of changes are equally enthusiastic about changing their activities in order to support a strategy aimed at tourism development.

In order to bring about desirable changes in tourism, policy-makers employ a range of instruments which combine resources and rules: in order to make actors behave in ways conducive to policy goals, resources are made available on more or less stringent conditions. Table 3.4 provides an overview of the 12 basic types of policy instruments and identifies the main instruments employed in the *EURODITE* case studies. Although all four types of policy resources and three types of policy rules are being employed, it is also clear that some instruments are clearly occurring more frequently than others. Mandatory measures and the use of authority and finance as policy resources are relatively rare, and they are only found in the form of land-use planning regarding

industrial heritage in Ruhr, funding for film projects in the Skaane region that can be exploited for touristic purposes, and the promotion of hotel construction in Antalya where planning has been combined with financial incentives to developers.

Table 3.4. Tourism policy: Policy instruments

		Policy resources			
		Authority	*Information*	*Finance*	*Organisation*
Policy rules	***Manda-tory***	*Typical example:* Land-use planning *EURODITE cases:* CN-1, IC-2	*Typical example:* (primary education) *EURODITE cases:* Absent	*Typical example:* Taxation *EURODITE cases:* Absent	*Typical example:* Tourism police *EURODITE cases:* Absent
	Condi-tional	*Typical example:* Quality certification *EURODITE cases:* Absent	*Typical example:* Specialist advice *EURODITE cases:* IN-1, IC-5	*Typical example:* Investment grants *EURODITE cases:* CN-1, IC-4	*Typical example:* Joint marketing *EURODITE cases:* IN-2, IN-3, IC-1, IC-3, IC-5
	Volun-tary	*Typical example:* (Summer time) *EURODITE cases:* Absent	*Typical example:* Websites, marketing *EURODITE cases:* CN-1, IN-2, IC-1, IC-4	*Typical example:* (Social security) *EURODITE cases:* Absent	*Typical example:* General infrastructure provision *EURODITE cases:* CC-1, IC-2

This makes four types of policy instruments the most common in the case studies:

- conditional access to information in the form of specialist training and advice, targeting rural tourism entrepreneurs in Achterhoek and museum professionals in North Jutland,
- unconditional access to information in the form of marketing and branding efforts in Antalya and North Jutland,
- unconditional access to organisational capacity through general infrastructure supporting football tourism in Antalya and industrial heritage tourism in Ruhr, and
- conditional access to organisational capacity, by far the most frequently used policy instrument, in the form of network creation and facilitation which is recorded in all regions except Achterhoek.

This leads to some important conclusions with regard to tourism policy that are mutually reinforcing. Clearly conditional measures dominate, making it necessary for policy-makers to be able to offer tourism actors relevant resources on attractive terms, and at the same time most policy measures are of a nature that requires policy-makers and the implementing organisation to have specific knowledge about tourism as an economic activity, otherwise neither specialist advice nor network-building would be possible to set into motion. In other words, the policy instruments

employed are of an inherently knowledge-intensive nature, and hence in order to be successful, they presuppose that policy-makers and their staff have access to this information – a theme that will be pursued further in the following section.

Table 3.5. Tourism policy governance

		Public-private governance		
		Government	*Network*	*Market*
Public governance	***European***	*Typical example:* Competition rules *EURODITE cases:*	*Typical example:* Structural Funds *EURODITE cases:* IC-2	*Typical example:* Marketing *EURODITE cases:* IN-1
	National	*Typical example:* Taxation *EURODITE cases:* IC-5	*Typical example:* Cluster initiatives *EURODITE cases:* IN-2, IN-3	*Typical example:* Inward investment attraction *EURODITE cases:* IN-1, IC-4, CN-1
	Regional/ local	*Typical example:* Land-use planning *EURODITE cases:* IC-5, IN-3	*Typical example:* Public-private partnerships *EURODITE cases:* IC-2, IC-3, IN-2, IN-3	*Typical example:* Marketing *EURODITE cases:* IC-1, IC-4, CC-1, IN-1, IN-2

Finally, the form of governance involved in tourism policy is important from a *EURODITE* perspective, both with regard to the geographical scale of public intervention and the relations established between policy-implementing organisations on the one hand and the actors targeted by them on the other. The increasing importance of multi-level governance in regional economic development policy has often been noted, as have the increasing blurred line of division between public actors through the establishing of public-private partnerships, networks, etc. As summarised by Table 3.5, both these trends are clearly visible: in the one hand most *EURODITE* case-study policies involve input from several tiers of government, although the sub-national level is especially prominent and the role of the European level reduced to provision of finance through its regional development initiatives (EU sectoral policies on tourism are weakly developed), and on the other hand half of the policies involve building network links of a more permanent nature between public and private actors.

4. Tourism policies and knowledge dynamics

The TKDs and FKDs within tourism confirm the general point in WP3 about knowledge dynamics in tourism, namely that the emphasis tends to be on exploration and examination of symbolic and

synthetic forms of knowledge. From the perspective of WP8 the question therefore is, both in relation to the Cooke 3x3 and Crevoisier 3x2x2 models, how the prevailing knowledge dynamics have or have not been influenced by public policies for tourism development.

As argued in the WP3 report on tourism, it can be expected that synthetic and symbolic knowledge types dominate tourism-related knowledge dynamics: synthetic organisational knowledge is a critical resource in especially rural/coastal tourism destinations depending on visitors travelling individually, and symbolic knowledge such as market intelligence about visitor preferences about what constitutes a pleasant vacation and product knowledge about e.g. local attractions for foreign visitors both are necessary to sustain a competitive international service activity. As illustrated by Table 4.1, the impact on public policy only concerns, unsurprisingly, synthetic and symbolic forms of knowledge, but the emphasis is very strongly on exploitation of knowledge: examination is only a major aspect in three of the ten policies identified while exploration is complete absent.

Table 4.1. Tourism policy impact on knowledge types and moments

		Knowledge types		
		Analy-tical	Synthetic	Symbolic
Know-ledge moments	**Explo-ration**	Absent	Absent	Absent
	Exami-nation	Absent	Adopt organisational knowledge: IC-1, IC-2, IN-2	Produce market intelligence: IN-2
	Exploi-tation	Absent	Increase organisational knowledge use: IC-1, IC-2, IC-3, IN-1, IN-3, CC-1, CN-1 Increase use of technical knowledge: IC-4, IC-5	Increase product and market knowledge use: IC-1, IC-2, IC-3, IC-4, IN-1, CC-1, CN-1 Mobilise local product knowledge: IC-5, IN-2

Looking further into the impact of tourism policies on knowledge dynamics, it would appear that a 'division of knowledge labour' would seem to exist within tourism in the sense that the more or less purposeful production of new knowledge tends to be undertaken by private or non-government tourism entrepreneurs – bringing together football or film actors, or identifying demand patterns among new types of visitors – while the knowledge impact of public policy focus on making existing knowledge available to a larger number of (small) actors who would otherwise have remained unenlightened due to the absence of a perfect market in information. As illustrated by Figure 4.1, this implies that the vast majority of policies increase the use of knowledge while only a major increase production of knowledge about products or markets.

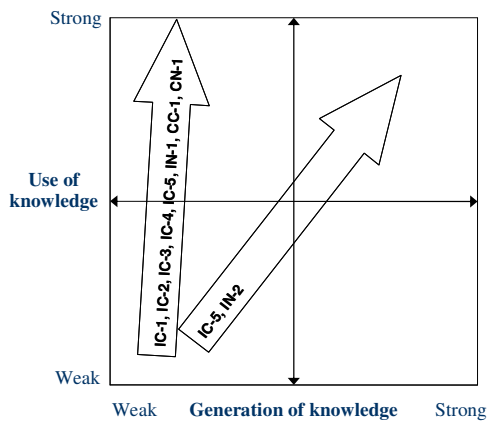**Figure 4.1. Policy influence on use and production of knowledge**

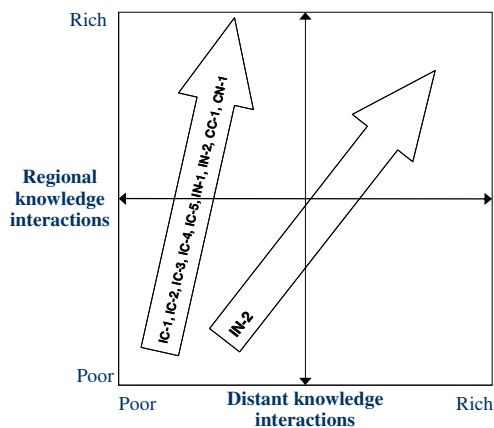**Figure 4.2. Policy influence on proximity and distance knowledge interactions**
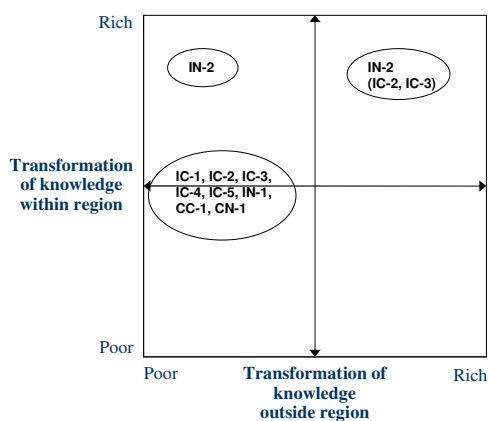

Figure 4.3. Policy influence on mobility and anchoring of knowledge

The geographical impact of tourism policies on knowledge dynamics is also worth noting. As illustrated by Figure 4.2, the vast majority of policies intensify interactions internally in the destinations/regions, while only three of them increase extra-regional knowledge interactions -

something which is particularly striking in the light of the interregional and indeed international character of tourist flows and which suggest a rather inward-looking producer-oriented perspective.

Finally, as illustrated by Figure 4.3, the main emphasis of the policy impact is clearly on transmission of external knowledge into the destination with varying degrees of contextualisation, while only one example of a policy with built-in extra regional effects have been identified: Learning *from* North Jutland has been institutionalised in the national programme promoting all-year tourist destinations, while the two cases from the Ruhr merely appear to have sparked imitation elsewhere (implying at best an indirect reciprocal learning process).

All in all policies primarily stimulate local use/adaptation of external knowledge, with a significant minority involving production of knowledge, more distance interactions, and, to a very limited extent, reciprocal interaction. Policies are in other words primarily stimulating local/regional knowledge dynamics, but it is also worth noting that the focus still generally is on what can only be seen as *critical* knowledge resources: synthetic organisational knowledge in rural/coastal destinations, and symbolic knowledge about markets and products for all forms of tourism – albeit *not* on *all forms* of critical knowledge, cf. the discussion below.

Two conclusions would seem to follow from this finding. Firstly, market intelligence depends on more or less tacit knowledge created in SMEs by interaction with tourists or (less widely circulated) through formalised market research of large organisations such as tour operators, and thus many tourism development initiatives are bound to be producer-driven in the sense that very limited, if any, efforts have been made to investigate the potential demand for new services and attractions. Secondly, that while making existing knowledge more widely available is of course a very valuable role for public policy, greater efforts in terms of stimulating creative knowledge production in SMEs, DMOs and public knowledge institutions might be an important additional way of stimulating tourism development and innovation.

Given that the impact of tourism policies is to stimulate the use or adaptation of existing knowledge rather than production of new knowledge, it is hardly surprising that the geography of tourism policy knowledge contains an important element of distance interactions. While the knowledge processes directly stimulated by tourism policies predominantly take place within the destination, the knowledge used by policy-making bodies is often extra-regional in the sense that it draws on practices developed in national networks (knowledge about rural tourism imported to Achterhoek, knowledge about tourism trends and organisational patterns imported to North Jutland, knowledge about coastal tourism imported to Antalya) or international practice (knowledge about

preservation and apprehension of industrial heritage). However, given the international nature of tourism and the geographical distance between service providers and visitors, it is again noticeable that only rarely is gathering of specific market information part of tourism policy, either as preparation for or as part of particular policy initiatives.

5. Tourism policy scoping

Given the fortunate spread of *EURODITE* case studies between different forms of tourism, it has been possible to analyse tourism policies in a variety of contexts and hence position policies in relation to prevailing and emerging knowledge dynamics in the sector.

From WP3 work on tourism it emerged that the knowledge dynamics of tourism as a complex international service activity have four main characteristics that are particularly relevant from a regional destination perspective:

- The long-distance relations between producers and consumers imply supply chains with key actors situated outside the destination itself (tour operators, budget airlines, foreign motorist/camping associations, etc.).

- The emergence of new, more complex, forms of tourism have lead to increasing polarisation of skills profiles in the sector, with high-level skills growing in importance.

- Since the 1990s the rise of e-trade in tourist services (package holidays, transport, accommodation, destinations, attractions) and the advent of new business models in transport (budget airlines) have greatly increased the international competitive pressure on destinations that could otherwise rely on loyal local customers.

- Given the complexity of services that constitute tourism experiences, destination management organisations are crucial in bringing together and making visible the offers of local SMEs to a wider audience of potential visitors.

Taken together this implies that knowledge about customer trends becomes increasingly crucial, but at the same time, especially for small private and public actors, such knowledge is also difficult to access (in so far it has been produced by e.g. large private tour operators) and difficult/costly to produce, except in the form of tacit knowledge picked up through interaction with existing customers.

The analysis of the tourism policies involved in the *EURODITE* case studies demonstrated that

- Policies generally focus on development of new services and mostly combine these with promotional efforts so that from this perspective combinatorial knowledge is clearly important.

- Symbolic knowledge is clearly seen as important, but nonetheless policy efforts often concentrate on synthetic (especially) organisational knowledge, and especially the efforts with regard to market intelligence and emerging trends about visitor preferences are surprisingly limited, despite the fact that the distance between producers and consumers of tourism services is an inherent characteristic of this particular form of economic activity.

- Policies generally target critical soft- and orgware resources – and indeed critical knowledge resources especially about products and organisation – in relation to their particular form of tourism, although it is noticeable that some targets (especially in-migration of specialist staff and involvement of public knowledge institutions) were not present, despite their obvious relevance in terms of bringing commercially relevant knowledge into the process, and

- Both the policy instruments favoured and the importance of ongoing network relations clearly demonstrate that current tourism policies are knowledge intensive, and they therefore depend on qualified knowledge inputs in order to successfully make a difference in tourism development.

- A growing importance of regulatory pressure as creator of knowledge-intensive demand is only present in a rather curious way in the case studies, because the only case where regulatory pressures play a major explicit role is in Antalya where the destination benefited from a lower level of regulatory pressure because the current wave of Russian etc. tourists has been partly fuelled by EU regulation that made it more difficult for Russian travel agencies to organise trips to Spain (visa regulations, noisy aircrafts).

At the same time it was, however, also clear that some expectations, both general and tourism specific, were *not* met by the policies analysed: KIBS are present but only occasionally central actors in policy-induced activities, the self-proclaimed gender-neutrality of most policies is probably supported but difficult to substantiate because despite its obvious relevance gender plays a limited role in the tourism case studies, and the importance of evidence-based policy-making remains limited because although using the experience of e.g. similar attractions is common place, the absence of systematic information about the demand-side is striking. However, and most importantly, providing specific market intelligence of relevance to individual development projects is rarely prioritised, and thus product development initiatives are relying on tacit knowledge

garnered by individual actors in meetings with previous visitors to the region, something that is clearly better at maintaining path dependencies than at supporting those new departures which are often at the heart of tourism policy initiatives.

All in all many useful and sensible policy initiatives are taking place within the field of tourism that further especially internal knowledge dynamics in regions and destinations. However, in the light of increased international competition driven by new business models, global information flows, and growing customer flexibility, the analysis nonetheless suggests that some key areas of tourism knowledge-related policy will be in need of more attention in the coming years if destinations are going to enhance or even maintain their position:

- Increased emphasis on creative generation of market intelligence, of a more specific character and focusing on emerging trends in order to be able to inform service development activities, something which would have to involve both private partners and public knowledge institutions.

- Greater attention to systematic use of extra-regional knowledge resources, including increased used of KIBS as knowledge intermediaries with regard to synthetic and especially symbolic knowledge about consumer trends, in order to move towards an evidence-based form of policy-making that is closer to both producers and consumers of tourism experiences.

- The increased knowledge intensity of tourist activities requires a greater focus on employee skills, including network between specialist individuals, that are often not effectively addressed by private firms but could be redressed through collaboration with public knowledge institutions.

- Efficient destination management organisations, well networked both locally and nationally, incorporating both public and private partners also in the wider experience economy, and capable of handling diverse and complex knowledges, appear to be a prerequisite to address public-sector localism and private-sector short-termism [an obvious case for dissemination of 'best-practice' activities].

- Greater efforts in terms of involving tourism SMEs, including micro-firms, in both the design and implementation phase of policy-making in order to ensure that this group of size-wise small but in aggregate very important actors become an integrated part of the process of change.

- More consistent evaluation of existing policy initiatives in terms of making a difference [another case for dissemination of 'best-practice' activities].

- Increased emphasis on creative generation of market intelligence, of a more specific character and focusing on emerging trends in order to be able to inform service development activities, something which would have to involve both private partners and public knowledge institutions.

In short, room for improvement would seem to exist not least with regard to knowledge-explicit initiatives that can address the basic asymmetry between producers and consumers of tourism as an international personal service experiences for increasingly mobile visitors. And in terms of concrete policy initiatives the list above suggests that there is something to work on for 'average' and for 'front-runner' destinations in terms of gearing policies better to current and not least future knowledge society conditions.

6. Appendix: Tourism policies and WP8 hypotheses

Hypothesis	Tourism policy conclusions
Limited policy attention accorded to symbolic forms of knowledge	Symbolic knowledge is clearly seen as important, but nonetheless policy efforts often concentrate on synthetic (especially) organisational knowledge…
Limited policy attention accorded to the consumption side of economic knowledge processes	… and especially the efforts with regard to market intelligence and emerging trends about visitor preferences is surprisingly limited, despite the fact that the distance between producers and consumers of tourism services is an inherent characteristic of this particular form of economic activity.
Limited policy attention accorded to supporting combinatorial knowledge processes	This is not immediately obvious, perhaps because the complexity of tourism services has already made combinatorial knowledge widely accepted.
Limited policy attention accorded to supporting extra-regional knowledge processes	Yes, and surprisingly so, cf. the comments above.
An increasing importance of knowledge-intensive policy instruments	Clearly evident.
The increasingly multi-level nature of policy-design and implementation	Clearly evident.
The growing role of private KIBS (and freelancing academics) in policy design and implementation	KIBS are present but only occasionally central actors in the policy processes.
The self-proclaimed gender-neutrality of most policies	Clearly evident, but in general gender plays a limited role in the tourism case studies, despite its obvious relevance.
Evidence-based policy-making is of increasing importance	Clearly *not* the case, at least not in a comprehensive way: although using the experience of e.g. similar attractions is common place, the absence of systematic information about the demand-side is striking.
Growing importance of regulatory pressure as creator of knowledge-intensive demand	Te only case where regulatory pressures play a major explicit role is in Antalya where the current wave of Russian etc. tourists has been partly fuelled by EU regulation that made it more difficult for Russian travel agencies to organise trips to Spain (visa regulations, noisy aircrafts)

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