INNOTOUR: An Innovation in Tourism Policy

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1 Introduction

In the last decades innovation in the tourism industry used to be a rather under-researched field. Today, it has become the centre of attention of tourism research focussing on different aspects (e.g. Keller 2005a, Zeng 2010, Hjalager & Nordin 2011). Tourism innovation research has been conducted for the accommodation sector (Volo 2004, Pikkemaat & Peters 2005, Sundbo et al. 2006, Ottenbacher 2007, Martinez-Ros & Orfila-Sintes 2009, Orfila Sintes & Mattsson 2009) as well as on the tourism destination level (Flagestad et al. 2005, Pechlaner et al. 2006, Pikkemaat & Weiermair 2007, Paget et al. 2010, Raich & Zehrer 2013). Furthermore and to a less extent research has analyzed tourism innovation policy (Keller 2005b, Keller 2006a, Keller 2006b, Smeral 2005, Svensson et al. 2005, Pikkemaat & Peters 2014, Lun et al. 2014). Hjalager (2010) underlines this aspect in her state of the art review comprising relevant research results gained so far in the field of innovation: "The issues of innovation policy have not been given the priority that they deserve in tourism research." (p. 9).

The aim of the present paper is, to investigate innovation in alpine tourism and shed more light on today's innovation policy in tourism and on innovation patterns. After a short introduction the paper undertakes a literature review to present major challenges and characteristics of innovation in alpine tourism, such as its structure, the small and medium size of tourism firms, the need for cooperation, etc. In the second part of the paper the Swiss government innovation

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supported programm InnoTour which was mainly initiated by Peter Keller is presented and effects of InnoTour are discussed. Results and implications for tourism policy to deal with the challenges of innovation will be presented in the final chapter.

2 The Concept of Innovation

An innovation may be determined by scientific research resulting in new technology, by individual entrepreneurship, or by strategic decision and management (Sundbo 1997). While the first paradigm is characterized by the organisation of the innovation process in R&D departments in the second case innovations are the result of entrepreneurs who are willing and able to innovate. The third paradigm is the strategic innovation paradigm which emphasises the strategy as the core innovation determinant. Following the strategic approach which is favoured for services by Sundbo (1997) innovations are market-driven and are formulated within the framework of a strategy: "The top managers of the firm control the innovation process, but ideas for innovations come from all parts of the organisation and from the external network of the firm" (Sundbo 1997, p. 436).

A distinction is typically made between ‘invention’, ‘innovation’, ‘diffusion’ and ‘imitation’. Hence, while the term ‘invention’ stands for creating something new in general, ‘innovation’ means to successfully establish a new product on the market or to implement a new process into the production cycle of a company. ‘Diffusion’ and ‘imitation’ essentially mean that competitors start to adapt and copy new products and processes (Dosi 1988). The goal of innovation is a positive change in terms of productivity or added value and to maintain a balance between process and product innovation. Innovation seems to be a major driving force for the competitiveness in tourism (Nordin 2003, Smeral 2005, Danneels 2007). There are a number of definitions of ‘innovation’ in several disciplines, which differ in terms of variety and have different implications. At least in most business contexts, innovation is linked with the growth theory of the economy (Freeman 1990). While the neoclassical growth theory uses explicit and implicit assumptions to faultless maximisation, the Schumpeterian theory is quite different.

According to Schumpeter (1965), innovation depends on the characteristics of the entrepreneur, who is faced with a dynamic economic environment. Basically, Schumpeter (1965) identified five types of innovation: product (1) and process (2) innovations, the utilization of new resource markets (3), new suppliers (4) and the change of market structures (5). These types of innovation can also be found in the service sector as the most important economic driver (see figure 1).

Thus, in the field of tourism, product innovation can be achieved on three different levels: at the service level, at attractions' level and at the destination level. Likewise process innovation may be accomplished in management, logistics or through network improvement. The usage of new technologies (e.g. transportation, internet) is considered to be an innovation through entering new resource markets while opening new market segments is a suppliers' innovation. Developing new regional markets on the other hand can work both ways: either by utilizing new resource markets or by rendering new sales markets accessible. Changing market structure (i.e. creating/destroying monopolies) is also regarded to be an innovation.

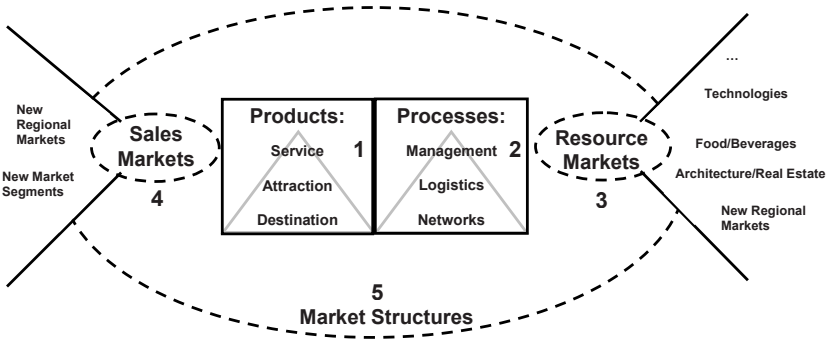

Figure 1: Adaptation of the Schumpeter model of innovation to tourism

Source: Pechlaner et al. 2010, p. 83, based on Schumpeter, 1965; Pechlaner et al., 2005, p. 35

The concept of product and process innovation is widely accepted in the tourism industry among various authors (Hjalagar 1997, Volo 2005, Pikkemaat & Peters 2005, Keller 2006b). But while refer to the traditional Schumpeterian typology of the five types of innovation (Walder 2007, Hall and Williams 2008), others add marketing, management, logistics and institutional innovations (Hjalagar 2002).

Coombs and Miles (2000) distinguish three approaches for studying innovation in services: (1) the assimilation approach, which treats services as similar to manufacturing; (2) a demarcation approach, which treats innovation in services as distinctively different from that in manufacturing postulating new theories and instruments; and (3) a synthesis approach, which suggests to investigate how the specificities of service activities might reformulate innovation approaches in manufacturing. Innovation studies have been carried out using all three approaches. The assimilation approach has been applied very often, for

instance by Preissl (2000), Hughes and Wood (2000), Johannessen et al. (2001) or Hollenstein (2001). The demarcation approach which focuses on distinctive features of service innovation rather than comparing innovation in services with innovation in manufacturing has been applied and further developed in particular by the works of Sundbo (1997), Gallouj (1998), and Sundbo & Gallouj (2000) while the synthesis approach until now has only been applied by Gallouj & Weinstein (1997) and Drejer (2004).

3 Innovation in Alpine Tourism

When discussing innovation in tourism some specifics about Alpine tourism have to be considered. The emergence of a large number and variety of travel destinations and decreasing travel costs have changed tourism markets over the last two decades and gave birth to a highly competitive industry. In particular, many Alpine tourism destinations of Europe are faced with market failure due to the following reasons (Peters & Buhalis 2013): First, in the past the market side did not demand innovation or new product development as the majority of the demand consisted of neighbouring, risk-averse, culturally similar tourists travelling by car to the same alpine destination for decades (e.g. Germans to Tyrol for skiing). Second, entrepreneurs often show myopic and egoistic behaviour instead of long-term, rational, and economic reasons which is influenced by a low professionalism of the Alpine tourism industry in comparison to other branches. As a consequence there has been a dramatic increase in schooling and training of the tourism labour force within the last years. Third, as small and medium sized (SME) hotels dominate and international hotel chains are searched in vain, economies of scale and scope cannot be realized although few and far between some successful marketing and purchasing cooperation exist at the hotel level. As a matter of fact less cooperation/networking and cluster building exist in and between entrepreneurs and destinations resulting of the former mentioned low professionalism and the myopic behaviour of tourism entrepreneurs (Volo 2004, Pechlaner et al. 2006, Pikkemaat & Weiermair 2007).

Thus, regarding the development of new products and services and innovation strategies of tourism enterprises it seems important to differentiate between global tourism firms and SMEs. Keller (2005b) compares the international tourism industry with the fragmented SME-dominated European (Alpine) tourism industry (see figure 2). On the one hand, tourism consists of global tourism firms, typically known as international hotel chains, which are managed similar to multinational conglomerates in manufacturing. On the other hand, tourism involves a lot of micro and small-sized firms all over the world, often known as one-man enterprises. In most cases the latter do not even know or follow any strategy, which, for many cases eliminates the strategic and the R&D innovation

approach as theoretical background. Thus, an innovation deficit characterises the small and medium-structured tourism markets while the international tourism industry competes with innovation worldwide.

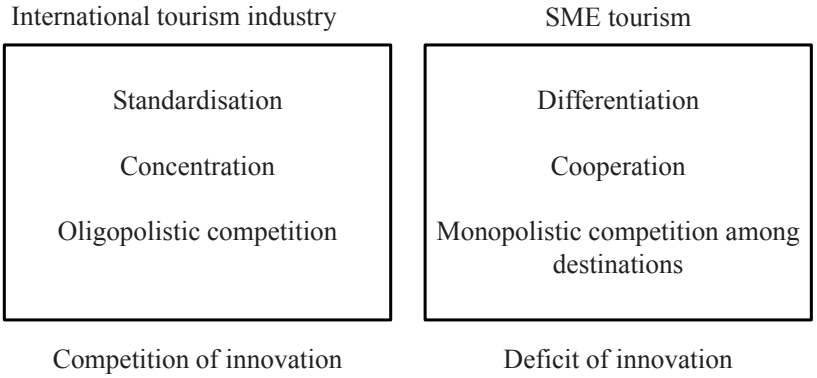

Figure 2: Competition and deficit of innovation in tourism

Source: Keller 2005b, p. 48

While the international tourism industry is typically known as international hotel chains, which are managed similar to multinational conglomerates in manufacturing, small businesses are often known as one-man enterprises which do not necessarily follow a particular strategy. Amongst other factors, it is this totally different management thinking which is responsible for an innovation deficit of medium-sized enterprises (SME). The international tourism or hotel industry however is characterized by a hyper competition in innovation worldwide (Hjalager 2002, Pikkemaat & Peters 2005, Keller 2006b). In comparison to other industries, research and development expenses or the number of licences or patents registered are relatively low in the hotel industry (Hollenstein 2001). Higher-categories hotels however are more innovative than lower-categories hotels. Chain hotels and hotels under management contract carry out more technological innovation than the average of hotels; internal R&D activities are neglected, but R&D embodied technology is introduced into hotels (Orfila-Sintes et al. 2005).

Since the beginning of the new millennium researchers have increasingly began to discuss innovation in tourism, e.g. for the hotel industry (e.g. Jacob et al. 2003, Orfila-Sintes et al. 2005, Ottenbacher & Gnoth 2005), the destination level (e.g. Flagestad & Hope 2001, Pechlaner & Tschurtschenthaler 2003) and

for small and medium-sized tourism enterprises (e.g. Hölzl et al. 2005, Pikkemaat & Peters 2005). While some focus on the measurement of innovation (e.g. Volo 2004, Pikkemaat & Weiermair 2004) as well as on patterns of innovation (e.g. Hjalager 1997, Hjalager 2002, Jacob et al. 2003, Weiermair 2003, Orfila–Sintes et al. 2005) or on the analysis of predominate determinants of innovation (e.g. Ottenbacher & Gnoth 2005, Walder 2007), some research is still missed. Regarding the destination level research still focus on accommodation and neglects other supporting services, such as transport, restaurant, shopping and animation. Regarding sample characteristics in most studies the entrepreneur's view is analysed rather than customer's or employee's perceptions. Instead of representative long-term national studies often single case studies in destinations are carried out. Results of innovation studies in tourism cannot be compared with other industries as measures and methods differ.

Nevertheless, there have been several studies looking at innovation in tourism and some results will be excerpted here: Weiermair (2003) for instance assessed determinants of innovation in North America and Europe within larger national and global firms to test the prevalence of process versus product innovation. Another study by Pikkemaat & Peters (2005) measured innovation determinants in small and medium sized hotels in Austria. The same authors noted that size and the level of quality (measured in terms of stars) of a hotel as well as a clearly defined target market have a significant positive influence on the level of innovation; however, the age of entrepreneur, loyal customers and satisfaction of entrepreneurs with hotel's revenue do not influence the level of innovation of the small and medium sized Alpine hotel industry. Similarly, Hölzl et al. (2005) identified management quality and organizational competence, profound market knowledge about competitors, and leadership competences as well as personal attributes as essential prerequisites for successful innovation. Ottenbacher & Gnoth (2005) found nine significant success factors of hospitality innovation: market selection, strategic human resource management, training of employees, market responsiveness, empowerment, behaviour-based evaluation, market synergy, employees' commitment, and tangible quality. Walder (2007) noted that risk behaviour and cultural values of SME owners or managers, their management and leadership style and the overall structure of the organisation influence the innovation behaviour of SMEs.

Due to the dominance of small businesses, the Alpine tourism industry displays innovation deficits and disadvantages in terms of innovative product development: first, small businesses lack economies of scale and are not able to raise profit margins which allow small units to reinvest in research & development, market research, product development, skills or creativity enhancement. Moreover, in many Alpine tourism valleys micro sized and family owned bed and breakfast entrepreneurs dominate the destination leading to a lack of any employees as well as the creation of knowledge. Second, SMEs in tourism are still

with some regard reluctant in terms of cooperation or strategic alliances with other competitors. However, cooperation would help to gain economies of scope, which would likely increase product- and services-variation and thus customer service experiences (Peters & Buhalis 2013).

For the Alpine tourism region Tyrol results of interviews with tourism entrepreneurs show that the overall relevance of cooperative activities in destinations are seen as prerequisites of innovation (Pikkemaat & Peters 2014). Especially vertical cooperation is interpreted as stimuli for innovation. Subsidies might target the formation of cooperation or clusters and should more focus on the implementation of ideas instead of the generation of ideas, because the latter remains an entrepreneurial activity. Hjalager (2002) and Hall & Williams (2008) support these results and interpret the role of tourism policy as a supporter of education, networking, and investments in tourism destinations. The latter are exactly the goals achieved and reached by InnoTour.

4 InnoTour and its Consequences on Innovation in Alpine Tourism

InnoTour can be interpreted as a tourism policy success story in Switzerland. In 1997 the federal law focusing on the promotion of innovation and cooperation in Swiss tourism was launched in order to support the industries adaptation towards worldwide market changes and competitive pressures. The program was lengthened 2003 and the third InnoTour period started 2008 and ended in 2011. After a positive evaluation of the second (see Müller & Gurtner, 2007) and third phase of InnoTour (see Bieger et al., 2010), a new InnoTour funding period together with new guidelines was launched in 2012. Beside innovation and cooperation the current program focusses on knowledge creation and management in order to strengthen the competitiveness of Swiss tourism (see figure 3).

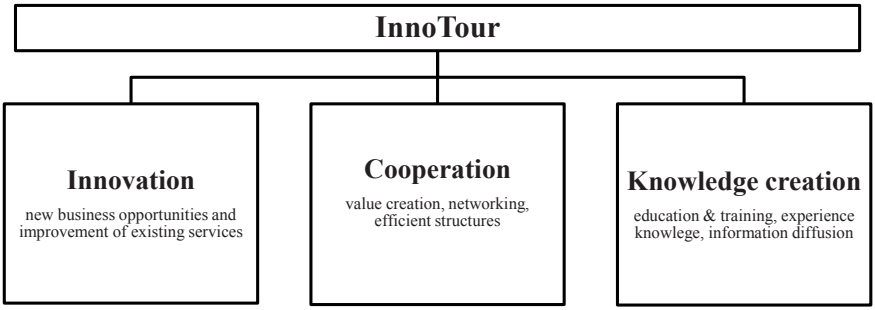

Figure 3: The funding concept of InnoTour 2012
Source: Codoni, 2011, p. 2

In the following we provide a short summary of InnoTour's outcome and impact which will highlight several funding priorities and key aspects of the program. Bieger et al. (2010) evaluated different innovation support programs in European countries as well as from the European Union. They identified a strong focus on small- and medium-sized businesses as well as on destination-wide product or service development initiatives. National funding programs want to create best-practices which might serve as stimuli for others in the industry (see Bieger et al., 2010, p. 58).

The acceptance of InnoTour in the Swiss tourism is very high and according to the evaluation of the second period of InnoTour the supported projects were quite successful and served as multipliers for further (non-funded) project initiatives. Müller and Gurtner (2007) evaluated the second InnoTour phase (2003-2007) and underlined the fact that the program goals have been achieved to a very large extent. 80% of all the InnoTour funding (19 mio. Swiss Francs) is spend in the targeted innovation clusters "quality", "destination development", "information- and reservation systems", "nature tourism", and "non-hotel accommodation". The overall project volume of these funded projects during this period was 80 mio. Swiss Francs. 32 of 39 projects could initiate further innovations and about 18 projects created additional employment having positive effects on sales and overnight stays (Müller & Gurtner 2007). The evaluation report also highlights the administrative efficiency of InnoTour and shows that in contrary to funding programs in other countries, InnoTour is a well-known and efficiently well-managed program.

The third phase of InnoTour (2008-2011) was evaluated by Bieger et al. (2010) according to five major challenges of Swiss tourism: fragmented value chains and networks, location/destination dependence, public goods, small- and medium-sized industry structure and service characteristics. The most positive three impacts areas of InnoTour can be seen in the improvement of networks and (destination) value chains which increased the overall customer value by the inclusion of all the relevant destination value chain members. Second, InnoTour focussed on regional and therefore on destination projects which supported the creation of competitive destinations to form a stronger basis for further (international) branding strategies. The third quite positive impact of InnoTour was its stimulation of public private partnership projects which again resulted in strengthening destination value chains (Bieger 2010, pp. 74). Small businesses often profit from these fundings and develop cooperative structures: however, many of these initiatives are not sustainable and cooperation or alliances end with the project. However, some examples show the opposite, e.g. the Matterhorn Valley hotels fostered a long-term innovation and success-model which was initially supported by InnoTour. It is obvious that InnoTour is improving

tourism value chains by focusing on the product (services, attractions and destination initiatives have been supported) level. Furthermore, processes and therefore networking and logistics are a major target of InnoTour as indicated in the innovation model of Pechlaner et al. (2010) (see figure 1).

5 Conclusion

The InnoTour project was developed during the 1990ies as a response to increasing competition in worldwide tourism. Based on tourism economists and research in the field of innovation and knowledge management, mainly Swiss researchers set the foundation for the implementation of such a program. Peter Keller, one main pillar of this research expertise, transferred this knowledge into political practice and initiated InnoTour.

Until today, InnoTour is an example for efficient innovation policy in an industry which faces strong deficits in the field of innovation management. As an economist Peter Keller developed sound requirements of innovation support: externalities, associated problems with public goods, and myopic behavior of tourism players are reasons which might call for policy intervention. Furthermore, InnoTour received such a high acceptance amongst tourism player because the administrative efficiency was exceptional. In addition, InnoTour was controlled and monitored during all its phases and allowed its critical evaluation based on the measurement of hard facts. InnoTour evaluations led to incremental improvements and extensions: The Swiss government monitors and adapts the program every four years and is therefore able to respond to the industry's needs.

Concluding this paper about InnoTour and its impact on tourism product development the following aspects need to be finally addressed: InnoTour was not only the first holistic initiative in the Alpine tourism industry focussing on innovation management and stimulation, but also one of the most research-founded and therefore successful innovation programs in the tourism industry. Until today, no other Alpine country initiated such a complex and long-termed tourism innovation policy program to support its tourism industry continuously. And what's most remarkable: Already in 1997 InnoTour was based on the deficits of the Alpine tourism industry focussing on cooperation and knowledge creation for tourism businesses. No doubt, InnoTour was an innovative tourism policy program.

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