Tourism Management in Japan and Switzerland: Is Japan Leapfrogging Traditional DMO's Models? A Research Agenda

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Abstract. Similarities may be seen in the development of tourism in Japan and Switzerland during the nineteenth and twentieth centuries, especially in terms of the origins and purpose of their respective national tourism offices. In the twenty-first century, however, fundamental differences became evident. During the first decades of the twenty-first century, Switzerland, that had been quick to see the opportunities of e-tourism, was less dynamic in response to the fourth and fifth industrial revolutions, whereas the opposite happened in Japan. Switzerland as with Austria and Germany, adopted a traditional concept of DMO's that was location-base and limited regionally by administrative boundaries. The Information and Communication Technologies (ICT) development after Web1.0 and the emergence of mobile applications have challenged this concept. A more contemporary view is based more on network travel and visitor flows rather than physical territory. The Japan Central government decided to adopt the western DMO concept as regional tourism policy, but relatively late in 2016.

The aim of this innovative research project is to analyze the adoption/implementation of the new concept of DMO's focusing on Switzerland and Japan. For Switzerland, the main barrier is the scarcity of data given the slower uptake of the technology emanating from the fourth and fifth industrial revolutions. In Japan, the situation may be seen to be inverted, given the country's proclivity to adopt the advantages from the latest industrial revolution. This may mean that Japan could leapfrog the traditional DMO concept. This research presents the Bass' analysis of DMO's websites as a proxy of DMO concepts – traditional or new generation.

Keywords: Destination Management Organization (DMO) · Japan · Switzerland · Travel network · National tourism policy · Diffusion models

1 Introduction

The popularization of leisure tourism occurred earlier in Japan than in many European countries. In the seventeenth century, equivalent to the early Edo or also known as the Tokugawa period (1603–1868) [1] Japan was under a feudal system and freedom of movement was strictly controlled. Permission to travel was granted for reasons either religious – visiting shrines and temples-or medical-visiting hot springs for healing illnesses, even though, these reasons were, to some extent, a kind of excuse to hide leisure motivations [2, 3]. In this era, improvement and expansion of the road networks contributed to the development and popularization of leisure tourism. In Western countries, such as Great Britain, visiting hot springs had been a well-established leisure activity from Roman times, and in the seventeenth century was reserved only for members of the upper classes. The popularization of leisure tourism in Britain came later, by the middle of the nineteenth century when a railway network was established [3]. The means of transportation explains the British and western European later popularization of leisure tourism in comparison with Japan. In the seventeenth century roads were in poor condition so carriage transportation was the most important means of transportation; moreover, travel on foot was dangerous and distance between inns along main roads was suitable for a day carriage trip but too far for foot travellers. In Japan, the carriage trip was mostly not allowed for security reasons-preventing attacks on Edo-Tokyo - so most of the travellers walked on roads, contributing to the earlier popularization of tourism activities in comparison to Europe. Another important difference during the seventeenth and eighteenth centuries was that Japan, due to the policy of closure of the country, domestic tourism only was developed, whereas Britain and continental Europe developed overseas tourism, often in the form of the Grand Peregrination or *le Grand Tour* [3–5]. British tourists greatly contributed to the development of Switzerland’s international tourism, not only to urban tourism, but also to the Alpine resorts and in the development of Alpinism [6, 7].

The evolution of the tourism sectors in Switzerland and Japan may be seen to be quite synchronic in terms of national organization during the nineteenth and twentieth centuries, nevertheless in the twenty-first century major differences became apparent. On the one hand, Japan seems to have neglected the importance of digital tourism marketing in the beginning of the internet revolution in the latter decades of the twentieth century, and in the first decades of the century, perhaps because the tourism sector was not considered as a central national subject from 1980 to 1990 neither by politicians nor academics or even the media. As an example, after the national universities reorganization as corporations in 2004 no university had graduate schools or research departments in tourism [8]. On the other hand, Switzerland currently appears to be less dynamic in of its response to the fourth and fifth industrial revolutions in the so-called “Smart Society” or “Society 5.0” respectively. The Global competitiveness Report by the World Economic Forum (WEF) ranked Switzerland and Japan 5th and 6th respectively in 2019 [9]. In the WEF Travel & Tourism (T&T) Competitiveness overall index both countries are again ranked in the top 10, Japan is ranked 4th and Switzerland 10th [10].

Switzerland was a pioneer in modern tourism during the second part of the nineteenth century, with, for example the development of luxury or palace hotels through the innovations of Cesar Ritz and the creation of the first hotel school in the world [11, 12].

Tourism for Japan was considered as both a macroeconomic tool to obtain foreign currencies but also as a diplomatic tool facilitating the ending of isolation of the early stage and to cope with the consequences of the Pacific War [2]. Another major difference was the openness to foreign visitors in the nineteenth century: Switzerland was open to foreign visitors without restrictions whereas Japan restricted visitors' itineraries on the behalf of a "foreigner's travel ordinance" regulation from 1859 [6, 13]. Later we see more alignment in both countries' tourism development.

1893 was a milestone in tourism organization for both countries: The Association of Swiss Tourist Offices and *Ecole hôtelière de Lausanne* were founded in Switzerland [14] and in Japan the program "Welcome Society" was founded by the financial sector with the intention of providing services to foreign tourists [13]. This was supplemented by the founding of the Japan Tourist Bureau in 1912. Another similarity may be seen in the role of the railways in the promotion of the countries: in 1904 the Swiss Federal Railways (SBB) created an advertising department to promote tourism [15] and in 1930 Japan formed the International Tourism Office under the Ministry of Railways that mainly served foreign tourists (later an International Tourism Office was created outside of the railways to increase inbound tourism) [13]. In 1906, Kuoni, the first Swiss travel agency was created. In 1917 the Swiss National Tourist Office (SNTO) was formed (five years after Japan's Tourism Bureau's founding) and in 1940 a federal resolution gave to the SNTO the official status as the Swiss Central Office for Tourism Promotion [16]. In 1948, the All Japan Tourism Association was formed, along with the creation of a National Tourist Association and the Japanese Tourist Association. In 1956 the "Five-Year Tourist Industry Promotion Plan" was activated [13]. During the 1950's, Switzerland was developing new ski resorts that resulted in it becoming one of the top five tourist destinations in the world [17].

In 1979 Switzerland was the first country in the world to focus on sustainable development by approving the "Swiss Tourism Concept". This pioneering concept resulted in the government of the Swiss Confederation assuming the role of a planner, regulator and developer of tourism channels [18]. In 1995 the SNTO became Switzerland Tourism (ST) and was reorganized as a marketing company, with 12 tourism regions [19] with ST launching its online presence "MySwitzerland.com" and its own e-mail system. In 1997, the *Innotour* program began as an instrument for promoting innovation and co-operation in the tourism sector and in 1999 the Swiss Parliament agreed to increase the support for ST to 190 million Swiss francs for the period from 2000 to 2004. A part of these funds allowed the development and promotion of e-tourism tools linking practitioners with academia in the fields of computer sciences and tourism in order to help marketing efforts and increase productivity [20].

Some of the most important milestones in Japan's tourism development are the founding of the Japan National Tourism Organization (JNTO) in 1964. Following the Expo of 1970, Japan entered a phase of rapid economic growth, and there was less emphasis on gaining foreign currency through tourism as Japan caught up with developed economies. As a result, outbound tourism began to outpace inbound tourism

[1, 13]. In 1987, and in order to reduce international frictions due to its trade surplus, Japan adopted the policy of double outbound tourism, launching the “ten-million plan” after the international Plaza Accord agreement in 1985 with the aim to depreciate the U. S. dollar in relation to the Japanese yen and German Deutsche mark by intervening in currency markets [21]. “No other country has ever developed a national policy to promote outbound tourism for such a reason” (page 1103) [13], showing once more Japan’s concept of tourism as a macroeconomic tool. There followed the “Law to Promote Inbound International Tourism by Diversifying Destinations in Japan”, the “Inbound Tourism Promotion Law” was created in 1996 and in 2003 the plan “Inbound Tourism Initiatives for Japan” was activated followed by a “Visit Japan campaign” program in 2004 [22]. The Tourism Nation promotion Basic Plan was made public in 2007 and subsequently the Japan Tourism Agency (JTA) was inaugurated in 2008, which aimed at the integrated development and promotion of outbound, inbound and domestic tourism [23].

2 Literature Review

2.1 Evolution of Western Conception of DMOs

The United Nations World Tourism Organization (UNWTO) has displayed a kind of semantic shift in the concept of western tourism destinations. In 2007, the UNWTO proposed the following definition of tourism destinations: “A local tourism destination is a physical space in which a visitor spends at least one overnight. It includes tourism products such as support services and attractions, and tourism resources within one day’s return travel time. **It has physical and administrative boundaries** defining its management, images and perceptions defining its market competitiveness. Local tourism destinations incorporate various stakeholders often including a host community, and can nest and network to form larger destinations” p. 1 (emphasis added) [24]. This is a traditional concept of tourism destinations embraced by western countries [25–27]. The DMO, which is the leading organizational entity of local tourism destinations “may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision” p. 16 [28]. This enforces the idea that tourism destinations are location-based, comprising transport, attractions, accommodations, ancillary services and experiences. Markets purchase and consume products and experiences, injecting extra-regional fiscal resources into a region where the multiplier effects contribute further regional growth and economic development [29]. This is evidently a static concept based on an industrial metaphor with means of production being the region, or the territory defined by physical and administrative boundaries.

In 2019, UNWTO updated the definition of tourism destinations as: “a physical space **with or without administrative and/or analytical boundaries** in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. **A destination incorporates various stakeholders and can network to form larger destinations.** It is also intangible with its image and identity

which may influence its market competitiveness” [28] p. 14 (emphasis added). This latter definition is more in line with recent technological developments [27] than the original one. In addition, it is a more dynamic concept oriented towards *travel networks* that may be a better and more accurate depiction. In the twenty-first century, the research agenda of network studies in tourism has sought to overcome the spatial dimension (i.e. geo-localisation aspects) and takes into account virtual dimensions, referred to as *travel networks* [30]. Evidence illustrating this virtual dimension consists of the following: firstly, travellers are creators and co-creators of the information contained by networks, which support travel planning; secondly, travellers share their experiences in community-based space and, finally; technologically supported networks are ubiquitous, meaning that the information can be found before, during and after the trip [31]. A shift of information and decision centrality into placeless and timeless networks has been observed, as with other sectors. Power patterns change from territorial organizations to visitor flows; therefore, flows become the units of work, decision and output. “Thus, the dialectic between centralization and decentralization, the increasing tension between places and flows, could reflect, in the final analysis, the gradual transformation of the flows of power to the power of flows” [32] (p. 171). This transformation of DMO’s from a traditional static concept to a new one that takes into account travel networks - physical and virtual- is challenging western tourism policies. Besides the human barriers such as the resistance to change present in any innovation, some technological issues are also present. One of the more challenging problems is the scarcity or lack of empirical data allowing the interpretation of the geographical and virtual travel network structures or flows that are vital to the formation of new generation DMO’s [26]. There are, however, a number of studies using different kinds of data [31] showing the relevance of statistical and mathematical algorithms for the geographical level description of the flows.

2.2 DMO Information and Communication Technology (ICT) Adoption

ICT’s have changed the way in which business is conducted in the tourism sector [e.g. 33, 34]. Werthner & Klein [35] pointed out from the beginning that ICT and the travel and tourism industry are closely “interrelated and intertwined” (p. 256). From an historical perspective ICT, Kracht & Wang [36] propose three generations of ICT adoption based on the evolution of distribution channels: each generation increases the complexity of ICT layers and is driven to a large extent by technological advances. The first generation consisted of traditional channels that emerged in the pre-World-Wide-Web (WWW) era, before 1993. The second generation of channels are the online direct channels, developed after the communication protocols of the WWW had been made, namely Web 1.0. It is characterized by the growing importance of new direct communication and distribution channels such as e-mail, online booking forms and internet booking engines (IBE). The third generation, beginning in 2004 is based on Web2.0 technology [37] and is characterized by mass collaboration and User Generated Content (UGC), such as videos, blogs, wikis, podcasts and tags, allowing consumers to share their experiences online and to create positive or negative reviews of services they have experienced [38].

In response to these developments, the UNWTO published in 1999 [39] a document alerting policy makers not only about the fast impact growth of Internet in the marketing of travel but also of the consequences of slower adoption of ITC's by DMO's in comparison to other tourism commercial sectors such as air transportation. DMOs' adoption of ITC's during the first generation (1970's to 1990's) was mostly dedicated to information operation and less to support reservation services. "Despite their increasing use of ITC's, most DMO's did not start considering electronic distribution until the increased public awareness of the Internet in the mid-1990s. From 1996 onwards, many DMO's started taking the impact of the Web more seriously, often recognising the opportunity to use the special features of the new medium – interactivity and multimedia. DMO Web sites multiplied rapidly, with increasing quality of graphics and maps, and the facility to book through a computer reservation system (CRS), usually by fax or e-mail. However, at this time "the facility to book online remains the exception rather than the rule" pages 65–6 [39] Therefore, ICT development by DMO was a major issue from 1996.

Several studies [40–43] focus on the diffusion of ITC adoption associated with the Web 1.0 based on the domain name registration (DNR) date namely the moment when a company first registered or purchased a domain name such as "myswitzerland.com" as a measure of the website age. A better measure, however, is provided by Wayback Machine (WM) (). The DNR measure could present bias as organizations may buy a domain name but wait months or years before hosting a website with that name. WM instead yields the first date that this crawler detected the website was activated [44]. The timing analysis of the adoption by Austria and Germany are similar to Switzerland and earlier than Japan. This shows that DMO's in these European countries belong to the traditional or first generation of DMO's.

Diffusion of an innovation by organizations often occurs in two stages: adoption and implementation and DMO's are not an exception. Implementation studies focus on the post-adoption effectiveness through the adopter organization, which in the case of website implementation progresses from basic to comprehensive sophistication [45]. As implementation follows adoption and advances in technology accrue, some of the newcomers' adopters implement new technologies on the spot, without any intermediary process. This kind of phenomenon is called "leapfrogging", meaning the bypassing of the early adopter in the use and/or implementation of a technology. Generally speaking, late adopters' leapfrogging behaviour consists of adopting or replacing a product by skipping previous generations [46]. As a consequence, latecomers who leapfrog previous generations could outperform the performance of early adopters [47]. Scaglione, Ismail [48] show evidence of a leapfrogging situation in tourism sectors regarding the implementation of third generation features - Web 2.0 – by latecomer adopters of first generation – Web 1.0- in international tourism sectors.

3 Research Questions

The territorially-defined policy of regional tourism organizations was different across the two countries. At the moment of inception in Switzerland and other European countries a bottom-up concept prevailed. Japan, however, defined regional tourism

organizations in a top-down way, emanating from the central government with constant new regions or re-definitions of the existing ones. In Switzerland, at least at the regional level, destinations remained more or less stable.

Since 2016, Japan has undertaken a new strategic bottom-up policy in the definition of regional tourism organization. [49]. The Japanese government has encouraged the formation of Destination Management Organizations (DMO's) entitled "World-Class DMO's" with the aim of promoting the revival of tourism under the management of diverse stakeholders in the community through a bottom-up approach. The Government provided assistance in three ways: information, personnel and financial support. In 2016 there were 134 DMO's registered. The aim of this "Japanese version of Destination Marketing/Management Organization" [49] (p. 161) is the creation of various regional content and establishing an environment to receive tourists to realize a "world-class tourism destination" under the keywords of 'region' and 'consumption' (p. 161) The central government considers DMO's as a tool for economic regeneration and creating employment through the development of regional human resources.

Empirical studies that have focused on the understanding of the Western imported term of DMO by Japan's tourism actors conclude that they are not able to clearly grasp the concept [50]. On the one hand, they point out that for the Japanese government, the organizations created before 2016 have not invested in productive marketing activities and have not sufficiently engaged in multi-stakeholder collaborative management. The sectorial 2019 WEF Travel & Tourism (T&T) Competitiveness index seems to support this impression: Switzerland ranks 31 whereas Japan ranks only 108 for the sub-item of Country brand strategy rating. On the other hand, those tourism associations (Kanko Kyokai) may already be considered as DMO's. "However, a commonly held perception by practitioners was that existing organizations and the new DMO candidates are distinct in structure. In other words, they did not consider their organizations to be a DMO unless they were registered with the national program. Many organizations had difficulties understanding and describing the basic DMO concept and related objectives" [50] (p. 378).

This reorganization of DMO's is compelling as it has been mandated by the Japanese government. The first research question for the agenda is: How long will it take for the realization of this Japanese version of DMO's built on the bottom-up concept proposed in 2016 to come to fruition?

Western academia and some policy makers show an increasing consensus supporting the idea that traditional DMO's have not fulfilled their original expectations [26, 27]. Therefore, this research question becomes even more relevant. In these instances, Japan appears to be a leader in the process of gathering tourism data in comparison to Switzerland. Sectorial 2019 WEF Travel & Tourism (T&T) Competitiveness index ranks Japan at number 10 and Switzerland at 30 for the sub-item of Comprehensiveness of annual T&T data. In addition, Japan is developing the Regional Economy and Society Analysing System (RESAS) [51] based on the aggregation of public and private data sectors with an aim to evaluate how money circulates through regions, the nature of the transactions between regions, tourism trends and demand. This system includes not only tourism sectors but also linkages to industry, agriculture, forestry and fishing. From this, the second research question arises. What is the level of integration and availability of RESAS data-beyond the tourism data-used by the

Japanese version of DMO's? The answer to this question is central because the greater the integration, the greater is the evidence that Japan DMO's are leapfrogging traditional static models and using network and dynamic data generation.

4 Methodological Agenda

The methodology for the first research question will be undertaken in three stages: firstly, information will be collected on Japan's Tourism Associations (Kanko Kyokai) and will focus on their own conception of DMO's. The following issues will be addressed: actual mission and activities (i.e. marketing/branding, coordination of stakeholders, digital activities); internal organization (creation date, number of employees, socio-professional profile of the DMO head, budget, number and kind of stakeholders, organizational structure degree of innovation, etc.). The second stage consists of desk research that will show the digital characteristics of DMO's from a qualitative perspective based on eFitness® benchmark [52], Web2.0 [53], social media [54] and timing of adoption based on the adoption date of the website. The third stage consists of using the information obtained from the desk research to complete the survey database to test significant links between relevant variables.

To fulfil the second research question, exploratory research will be carried out. This will comprise comparative analysis of key government documents (for example the Japan Government's white papers on tourism and the Swiss Government's "Digitalisierung im Schweizer Tourismus: Chancen, Herausforderungen, Implikationen" (Digitalization in Swiss tourism: opportunities, challenges, implications) [55]). It is believed that the analysis will provide insights on the leapfrogging phenomena. In addition, the analysis will identify the comparative advantages across both countries. Qualitative methods including interviews will be carried out with policy makers and important actors in both countries; legal regulations about data privacy will also be analysed following the methodology proposed by Beritelli [56]. It will consist of in-depth interviews supported by a semi-structured questionnaire organized in two steps: firstly, a number of prominent actors were interviewed from a group of private companies and public authorities, which a year earlier had participated in a process of destination strategy development. Secondly, each interviewee will be asked to propose at least three other prominent actors in the sector, in this way a snowball sample will be implemented.

Results of Preliminary Research: Adoption of DMO Websites. A preliminary study on the adoption of the technologies associated with the Web 1.0 was carried out on three European countries (Austria (AUT), Germany (DEU) and Switzerland (CHE) along with Japan (JPN). Table 1 shows 4 datasets concerning the time of first adoption by DMO's of Websites [57]. This was built using the internet Archives' Wayback Machine (archive.org) to gather the website age [44]. Table 1 shows the data under study. The Bass analysis and parameters were drawn from the SAS V9 Proc Model procedure [58].

Figure 1 shows the raw data of absolute frequency adoption per year and Table 1 shows estimate parameters of Bass model [59, 60] Eq. 1.

$$\frac{dN(t)}{dt} = p(m - N(t)) + \frac{q}{m}(m - N(t)) \quad (1)$$

Equation 1 shows the Bass function for adopting an innovation. $N(t)$ is the cumulative number of adopters at time t , m is the total market adoption. Parameters p and q , the coefficients of innovation and imitation respectively, fuel the adoption.

The coefficients p and q , respectively, suggest the propensity to adopt driven by external information and interpersonal communication channels [61]. With pure innovation, $q = 0$ and $p > 0$ and $p = 0$ and $q > 0$ with pure imitation. Table 1 shows the peak of adoption for each country with the three western countries demonstrating the peak of adoption occurring at the latest by the year 2000. The process of adoption, at least of the first hyper-circle was finished for them at the beginning of the twenty-first century. In contrast, Japan's peak is at the beginning of 2011. The S-shapes of the cumulative values (actual and forecasted) in Fig. 2, also show evidence of the slower process for Japan's DMO's to obtain the necessary critical mass to complete the whole process which will only, *ceteris paribus*, occur in 2031, that is in more than a decade from now.

The whole cycle has lasted 5 years and 4 months (~ 64 months) for Switzerland, 7 years and 4 months for AUT (~ 88 months); 8 years and 2 months (~ 98 months) for GER but for JAPAN the process is still ongoing and will last a total of 13 years and 2 months (~ 158 months).

Table 1. Timing of the adoption of DMO's Websites for 4 countries understudy and Bass' estimated parameters and its standard deviations in (parentheses)

Acronym source	Age/#URL *	Samples dates M/Y	Peak date	m	p	q	q/p
DMO CHE myschweiz.ch	149/155	12/96–2/05	7/99	149.2 (2.7)	0 (n.a.)	.873 (.075)	n.a.
DMO AUT [62]	96/96	12/96–7/10	9/99	95.54 (6.93)	.095 (.034)	.283 (.147)	2.9
DMO DEU [62]	182/188	11/96 – 10/10	12/00	182.34 (5.55)	.057 (.034)	.512 (.136)	8.9
DMO JPN JPN Tour. Agency	117 /127	2/97 – 11/19	3/11	123.27(11.14)	0	.2 (2.491)	n.a.

*Number of URL whose age is known over total number of URL for each country. The data and estimations for the European countries has been published in [57]

Fig. 1. Raw data of absolute website adoption yearly

Fig. 2. Actual and predicted cumulative adoption year in %

5 Conclusion and Future Research

There has been global interest in the role of DMO's and their influence in tourism development in both academic and practitioner circles recent years,

To date, however, there has been little empirical research comparing DMO's across countries. This study is innovative in that it is an international comparative empirical study on the evolution of DOM's between three European countries and Japan. A Bass model was used that showed the significant differences between European and Japanese DOM's. Japan demonstrates a lower proclivity towards the adoption of Web 1.0 by the DMO tourism sectors than the European countries in the study. It is not clear whether the delay in Japanese acceptance of the web was due to managerial aspects or simply a general disinterest or lack of awareness of the importance of the potential of the Internet as a new distribution channel for tourism. Given Japan's technological advancement in several sectors (robotics, electronics, information systems) it begs the question if it was due to the relatively low value placed upon tourism initially, but this remains an open question that may be an important topic for future research. The study gave a forecast for the length of time of the adoption of DMO's websites, with the stark contrast between the three European countries and Japan, with the conclusion that Japan is still in the process that will continue for eleven more years.

There is a possibility, therefore, for a possible leapfrogging of this traditional DMO concept. This is a relevant and intriguing question that will be addressed in the next phase of this research agenda.

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