

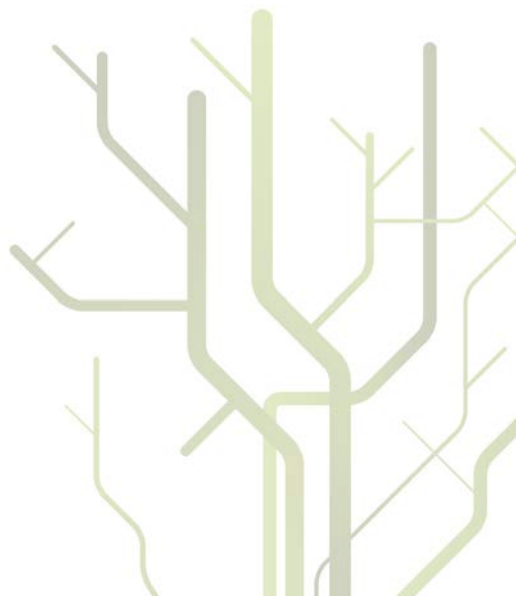
## **A study about knowledge and learning in small-scale tourism in rural and peripheral areas**



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## **Abstract**

This study investigates small-scale tourism in rural and peripheral areas from a knowledge perspective. It aims to contribute to reflections on relevant theoretical concepts, the identification of critical factors and the development of conceptual tools for tourism development and management practice.

This study is organized into four more delimited studies. The first study discusses Wenger's theory of Communities of Practice as a possible theoretical framework for understanding the knowledge-related processes within and between small tourism operators. The second study concerns the social media and their role in knowledge acquisition and sharing by and among small tourism actors. The third and fourth studies concern wildlife and food tourism, and look into the factors critical to their development and management.

This study concludes by identifying as particularly relevant learning arenas the spontaneous and informal groups that share an interest in a specific territory and the practice of tourism. Critical factors for the creation and functioning of such groups are identified, and a knowledge-based model for mapping the knowledge-based resources of a specific area is developed. Implications are also presented as regards the type of management to be adopted at the different levels.



# **1. INTRODUCTION**

## **1.1. Background and perspectives**

The tourism sector is undergoing significant changes, including new expectations and demands by the tourists, the application of new ICT (information and communication technology) by tourism operators and tourists, a growing interest among policy-makers on tourism as a means to regional development, as well as concerns about possible negative outcomes with respect to environmental and socio-cultural impacts. In this context, and not differently from the challenges present in other sectors, knowledge has become recognized as a critical resource.

Some tourism scholars hold that the academic community and the tourism industry have failed to include recent developments in the field of knowledge management, especially concerning the relevance of tacit knowledge and inter-organizational cooperation in terms of knowledge-sharing (Cooper 2006; Xiao 2006; Shaw and Williams 2009; Thomas *et al.* 2011).

This study aims to fill this gap, at least partly, by investigating tourism from a knowledge perspective. The overall intention is to contribute to a better understanding of knowledge and learning in tourism, more specifically, of the knowledge-related challenges in small-case tourism.

## **1.2. Focus**

The focus of this study is on small-scale tourism in rural and peripheral areas. Rural areas can be identified by various criteria, such as measurements of demography and land use, socio-cultural measurements and representations, including practices and discourses performed by individuals and groups (Halfacree 1993, 2007). ‘Rurality’, understood here as the identity of a specific rural area and the meaning that is given to ‘being and living rural’, can be seen as part of the stock of resources available in an area. With the increasing value attributed to rural amenities, ‘rurality’ can constitute a

tourist attraction (Lane 1993; Butler *et al.* 1998; Ray 1998; Lee *et al.* 2005; Halfacree 2007). Similar considerations can apply to the concept of ‘peripheral areas’: they are characterized by geographical distance from urban centres that rule out the practical possibility of daily commuting, and are typically associated with the presence of wild and pristine nature, indigenous cultures, and with the possibility of engaging in outdoor activities (Harrison and Price 1996; Brown and Hall 1999; Müller and Jansson 2007).

Although recognized as potentially important tourist destinations, rural and peripheral areas are often qualified as problematic, characterized by elements that can compromise the development and management of tourism. Rurality and periphery entail difficulties in terms of transport, communication and environmental vulnerability, as well as limitations in terms of financial resources, human and social capital related to elements like out-migration, aging and lower formal education (Harrison and Price 1996; Brown and Hall 1999; Müller and Jansson 2007; Hall and Boyd 2005; Hall *et al.* 2009).

### **1.3. Research questions and approach**

Within the context of tourism in rural and peripheral areas, and studying tourism from a knowledge perspective, this study focuses on small tourism actors. It investigates two main aspects: the understanding of knowledge and learning, and the critical factors for the development of small-scale tourism.

Two research questions are formulated:

- 1) How to conceptualize learning among small tourism actors?
- 2) What knowledge-related factors are critical for the development of small-scale tourism in rural and peripheral areas?

To answer these questions, this study has been organized into four more limited studies, and employs the case-study strategy (Yin 2003). The four studies respond to sub-questions that aim to contribute to one or both the questions presented above. The first study discusses whether Wenger’s theory of Communities of Practice can be adopted as a theory framework for understanding the knowledge-related processes

within and between small tourism operators (Wenger 1998). The second study concerns new ICT, in particular social media and their role in knowledge acquisition and sharing by and among small tourism actors. The third and fourth studies examine two forms of tourism that can be particularly relevant in peripheral and rural areas, wildlife tourism and food tourism, and the critical factors for their development and management.

#### **1.4. Outline of this thesis**

The following chapter presents the theory framework of this study, with considerations about its ontological and epistemological position and the underlying understanding of the phenomenon of tourism and its potential role in regional development. The third chapter builds on scholarly contributions in the fields of pedagogy, business and tourism, and focuses on the concepts of knowledge and learning. The fourth chapter discusses methodology, presenting the research questions and the research strategy. The fifth chapter presents the empirical part of this study. In the final chapter, results are discussed and conclusions drawn.

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## **2. THEORY FRAMEWORK**

Without aiming to give a complete description of the theory positions of potential relevance to the study of knowledge and learning in tourism, the following sections focus on the contributions that have proven most influential for this study.

Section 2.1 presents the position of this study in terms of philosophy of science. The reflections presented here attempt to answer the question: *What is tourism knowledge?* Section 2.2 and 2.3 focus on tourism as a phenomenon. Based on traditional and more recent definitions of tourism, these sections outline major aspects of the phenomenon of tourism and indicate the relevance that tourism can have for regional development, and alternative approaches in such a context. Finally, based on the considerations presented in the previous sections, section 2.4 makes explicit this study's theoretical position in terms of philosophy of science and in regard to the study of tourism, specifying the aspect investigated and the approach adopted.

### **2.1. Tourism knowledge**

Reflection on a study's position in terms of the philosophy of science is important, as ontological and epistemological issues relating to the underlying understanding of knowledge, are the premises for the development and conduct of any study (Blaikie 2000).

Over the past decade, scholars of tourism have debated the nature of tourism, with the main questions being whether tourism can be regarded as a distinct discipline, what tourism knowledge is and how it is produced (Tribe 2009). Some scholars have adopted Kuhn's perspective on science and science development (Echtner and Jamal 1997; Netto 2009). According to Kuhn, to each discipline corresponds a paradigm, i.e. a set of principles, theories, models and methods that is shared within the scientific community. Still according to Kuhn, science develops following a process that starts with a pre-paradigmatic stage, characterized by the lack of such a set of fundamental assumptions. Through the confrontation of various understandings of such assumptions,

science develops by affirming one paradigm over others. Essentially, the paradigm that is accepted within the academic community constitutes the core of that discipline. Netto (2009) observes that the systems theory thinking, based on the idea of a phenomenon formed by connected elements interacting with each other, is widely used by tourism scholars, and can be proposed as basic paradigm for the recognition of tourism as a distinct discipline.

According to Echtner and Jamal (1997), there exists no distinct paradigm in tourism studies, so the field can be said to be in a pre-paradigmatic stage. They note that tourism studies rely usually on concepts and methods from several other disciplines, and such an interdisciplinary aspect cannot be ignored when reflecting on the nature of tourism. Similarly, some scholars state that no single discipline can be applied to study the complex phenomenon of tourism, and advocate an approach based on several disciplines or an approach that goes beyond the division in disciplines and, instead of being focused on the classification of science into disciplines, it is focused on learning (Graburn and Jafari 1991; Echtner and Jamal 1997; Coles *et al.* 2009). Following Kuhn's theory, such a position is an obstacle to the establishment of a distinct paradigm for tourism as paradigms are thought to be incommensurable (Echtner and Jamal 1997). It is then problematic to apply Kuhn's perspective on science, and to view tourism as a distinct discipline and/or to qualify it as being in a pre-paradigmatic phase (Echtner and Jamal 1997; Coles *et al.* 2009).

Departing from Kuhn's perspective and adopting Bernstein's perspective on science, the debate on the disciplinarity of tourism leads to other considerations. According to Bernstein, an approach to science based on disciplines limits the potential progresses in terms of knowledge and learning (Echtner and Jamal 1997). Bernstein believes that any phenomenon can gain from the very interdisciplinarity that, as noted above, in Kuhn's perspective is viewed as a barrier to the scientific status of tourism studies. Such a position is in line with a pragmatist understanding of knowledge.

### **2.1.1. A pragmatist approach to knowledge**

Pragmatism can be located within the broad interpretative tradition of social science, characterized by a multiple understanding of reality and a practical interest (Tribe 2001). Postponing further considerations in regard to pragmatism to chapter 3, here we can simply note that pragmatism is based on a relativist ontology according to which reality does not exist objectively, and it acquires meaning according to the assumptions and perspectives of the knower (Ayikoru 2009). Pragmatists understand the core of social research as an exchange of viewpoints aimed at reflecting, learning, thinking differently and, finally, acting (Echtner and Jamal 1997; Baert 2005). In such a perspective, the main role of social science is to develop and apply the theories and methods to practical problems in order to solve them (Pansiri 2005; Baert 2005).

With such a pragmatist approach, the discussion of the nature of tourism knowledge shifts focus: from considerations of strictly science-based requirements for recognition as discipline, to seeing tourism studies as a field of both knowledge and practice (Echtner and Jamal 1997; Tribe 1997; Coles *et al.* 2009). Fields of knowledge differ from disciplines, as they focus on an area of interest, and are concerned with how to learn about it, independently from the origin of the knowledge required by such a process (Tribe 1997, 2004). Identifying tourism as *a field of knowledge* offers a viable path to progress in knowledge in line with the pragmatist perspective on social science (Baert 2005; Tribe 1997, 2004). Tribe observes that not only different types of knowledge are relevant in tourism, but also that the combination of procedural knowledge, sometimes referred to as ‘knowing how’ and typically practice-near and contextual, with the more discipline-oriented propositional knowledge, also called ‘knowing that’, contributes to knowledge production and, consequently, to the application of knowledge in the progress of tourism.

### **2.2. The phenomenon of tourism**

Several conceptualizations of tourism exist. As Tribe (1997) notes, some definitions of tourism are couched in terms of monetary flows and belong to the economic approach identified by Leiper (1979). Such definitions have been criticized by some scholars as

being limited, and more holistic definitions have been proposed. One early holistic definition is that offered by Jafari (1977), who includes in his conceptualization of 'tourism', in addition to tourists, also the tourist industry and the total impact on the socio-cultural, economic and physical environment. Such elements also figure in more recent definitions (Tribe 1997; Netto 2009). Widely diffused is the definition offered by Leiper (1979), who describes the phenomenon of tourism as an open system involving the tourists, the 'generating' regions from which the tourists come, the transit route, the destination regions, and the tourist industry (Hall 2010). Today there is agreement among scholars that tourism is a particularly complex phenomenon, sometimes compared to a living system composed of social and natural elements and characterized by being non-linear and non-deterministic (McKercher 1999; Farrell and Twining-Ward 2004).

In line with these changes in the understanding of the phenomenon of tourism, the concept of 'tourist destination' has assumed various meanings. Traditionally a destination was considered as a territorially bounded place: more recently, a destination is viewed as having not only a static dimension, related to geographical space, but also a dynamic and relational one, related to the interactions of the involved actors (Framke 2002; Jóhannesson 2005). In this context, tourism has been defined emphasizing the supply side, more specifically including tourism workers and their practice. Focusing on the supply side of the tourism system, some scholars have adopted a management approach, investigating the resources involved, also human resources (Cohen 1979; Baum 2002; Cutler and Carmichael 2010; Morgan 2010). Also in Leiper's conceptualization, the tourist industry is viewed as a critically important part of the system, as it is in direct relation with all the other components involved in the phenomenon known as 'tourism'. Within the industry, a varied range of different actors is recognized: especially in the last decade, several scholars have stressed the importance, and in some cases the necessity, of collaborative relations among them (see for example Grängsjö 2003; Schianetz *et al.* 2007). In this context, small and medium tourism enterprises (SMTEs) are well represented and critically important in giving a destination its special character and distinctiveness (Tinsely and Lynch 2001; Grängsjö 2003).

### 2.3. Tourism and development

Several scholars have studied the relation between tourism and regional development, and four distinctive positions have been identified to conceptualize tourism in relation to development (Jafari 2001; Sharpley 2002; Tribe 2002). Such positions are defined as platforms of thinking, with each platform characterized by a particular way of viewing tourism, its role in terms of influencing the development of the specific region where it takes place, and focusing on different elements.

The dominant positions adopted by academics and practitioners from the 1950s to the 1970s are often referred to as the ‘advocacy’ and the ‘cautionary’ platforms. The advocacy platform is based on the concept of development as modernization, and focuses on the economic benefits. Such an approach sees tourism as a tool for increasing prosperity. By contrast, the cautionary platform corresponds to the developmental theory of dependency, drawing attention to considerations of the power relations among actors and viewing tourism as a form of neo-colonialism.

The ‘adaptancy’ platform developed in the 1980s is characterized by a focus on possible alternative forms of development. It advocates a view of tourism that can be described as ‘alternative tourism’: a form of tourism adapted to the context where its activities take place. Among the forms of alternative tourism advocated, *sustainable tourism* has gained considerable acceptance in recent decades. As point of departure for conceptualizing sustainable tourism, some scholars have adopted a view of sustainable development as a knowledge-based set of practices where various types of expertise are integrated (Tremblay 2000; Farrell and Twining-Ward 2004; Bruckmeier and Tovey 2008). The underlying tenet is that the necessary premise for sustainable tourism development is human and social capital, professional skills and competence in a wide range of fields and, more practically, the ability to coordinate their actions over a broad spectrum of knowledge (Farrell and Twining-Ward 2005; Hall and Boyd 2005).

Knowledge is the central element of the fourth platform, the ‘knowledge-based’ platform. Such a platform is favoured mainly by academics who advocate a rigorous approach to tourism that can be qualified as scientific (Echtner and Jamal 1997; Jafari 2001; Smith *et al.* 2010).

## 2.4. Position of this study

This study's standpoint in terms of the philosophy of science is influenced by pragmatism. In a pragmatist perspective, this study, located as it is within the research domain, can be viewed as part of an academic dialogue on the specific topic of knowledge and learning in tourism.

The focus here will be on the supply side, especially on the small enterprises and the practitioners of the sector, and, as indicated above, on knowledge as a critically important factor. As such, this approach does not meet the requirements of multidisciplinary advocated in the knowledge-based platform. Rather, and despite its clear emphasis on knowledge, this study can be located within the adaptancy platform.

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### **3. KNOWLEDGE AND LEARNING**

Chapter 3 describes this study's underlying understanding of knowledge and learning. Such reflections introduce the central concepts investigated in the empirical portion, presented in chapter 5 and discussed in the final part, in chapter 6.

Section 3.1 introduces the concepts of knowledge and learning, referring mainly to the works of educators John Dewey and Etienne Wenger. Section 3.2 focuses on the concepts of knowledge and learning as presented in the business literature, mainly in the works of Ikujiro Nonaka, John Seely Brown and Paul Duguid. Section 3.3 presents those contributions in the tourism literature that are in line with the understanding of knowledge and learning described in the preceding sections. Finally, section 3.4 concludes the chapter by briefly presenting how the thesis views knowledge and learning and how it aims to contribute to the field of study in question.

#### **3.1. Social learning and reflective practice**

In developing an understanding of knowledge, this study refers to the American philosophical school of pragmatism. Pansiri (2005) presents pragmatism as an alternative to the two main paradigms in social sciences: the positivistic and the interpretative. In the pragmatist perspective, knowledge is sometimes referred to by the term 'knowing' (Cook and Brown 1999; Orlikoski 2002). Orlikoski (2002) explains the difference between such terms, noting that 'knowledge' is a 'noun connoting things, elements, facts, processes, dispositions', while 'knowing' is 'a verb connoting action, doing, practice' (p. 251). According to pragmatists, the meaning attached to 'knowing' is strictly related to 'reflecting' and 'doing'. Such a concept is illustrated effectively by the expression: 'the knowing is *in* our action' (Schön 1987: 25). Similarly, John Dewey, considered the main representative of pragmatism in educational settings, views knowledge as a combination of abstract reasoning and action that can be applied in order to cope with reality (Cook and Brown 1999; Talisse 2000; Pansiri 2005; Baert 2005; Noddings 2007).

In Dewey's view, the nature of knowledge is social: each individual belongs to one, or more, social groups, and learns in socio-cultural environments (Campbell 1995; Phillips and Soltis 2004). Such a position has its origin in the understanding of the human beings as problem-solvers as well as social creatures shaped by the context (Campbell 1995). As a consequence of this understanding, the environment plays a central role in Dewey's thought. Individuals are located within a context; and such a context, with its physical and social aspects, determines the potentials that individuals have for learning and acting (Campbell 1995; Talisse 2000). Although such a centrality recognized to the social aspect of human beings, individuality is also fundamental in Dewey's thought. The development of a person is considered taking place within social groups that allow and value diversity, and individual variations are considered important for the society to grow (Campbell 1995b).

Dewey's recognition of the relevance of the socio-cultural environment in which learning takes place is closely related to the concept of 'situated learning'. This concept, together with the related concept of 'social learning', refers to the understanding of learning as an activity that occurs in situations where the person is located and is actively engaged in a practice and in social relations (Gherardi 2000; Phillips and Soltis 2004). This understanding of knowledge forms the starting point for the work on apprenticeship conducted by Jane Lave and Etienne Wenger (1991), who view learning as the process of becoming full participants in communities of practitioners. Such a concept is further developed by Wenger in his social theory of learning, the theory of communities of practice, where the focus is on learning as practice and as becoming a member of a group (Gherardi *et al.* 1998; Wenger 1998; Phillips and Soltis 2004). Such a position resembles the concepts of 'know that' and 'know how' by the philosopher Gilbert Ryle, and of 'learning to be' by the psychologist Jerome Bruner. According to such concepts, learning requires more than accumulating knowledge about something, and, through practice in social settings, it engages the learner on a much deeper level (Brown and Duguid 2000b). In this perspective, then, the main idea is that it is through practice that people learn how to do a certain activity, while at the same time they learn to be, developing an identity. Within this framework, and in line with the ideas expressed by pragmatists, Wenger understands knowledge as being primarily a matter of competence with respect to an enterprise and knowing as a matter of participating in the pursuit of such practice (Wenger 1998).

### **3.2. Knowledge in business contexts**

Several of the ideas presented above can be found in the business literature, in particular, rejection of the understanding of learning as an exclusively cognitive activity, the related recognition of the social dimension of learning as a natural part of the human life, and the importance accorded to the context (Alvesson and Kärreman 2001; Llorca 2008; Amin and Roberts 2009; Murillo 2011).

While the preceding section presented the conceptualization of knowledge and learning by educators, this section focuses on the contributions made by business scholars, Nonaka, Brown and Duguid in particular. Such scholars can be described as belonging to the field of study of knowledge management, and their contributions are clearly related to the emerging field of study concerning ‘strategy as practice’. Knowledge management can be described as the field of study that integrates different disciplines, and views strategies and practices of valuing and using knowledge as among the resources of an organization. In this sense, it can be seen as a specification of the broader resource-based theory (Barney 1991; Barney *et al.* 2001; Wright *et al.* 2001; Blackman *et al.* 2011). ‘Strategy as practice’ as a field of study emerges from the concern to include the people in the study of business strategy, and specifically their doings at various levels, as individuals and as aggregate actors (Jarzabkowski and Spee 2009). Applying the knowledge management taxonomy adopted in Blackman *et al.* (2011), we may describe the position held by Nonaka, Brown and Duguid as belonging to the organizational branch of the Behavioural School, focused on, *inter alia*, knowledge, networks and collaboration.

#### **3.2.1. Characteristics of knowledge and learning**

Ikujiro Nonaka has provided some of the most significant contributions in terms of knowledge understanding. In his first works, the focus is on the recognition of tacit and explicit knowledge, the process of conversion among such forms of knowledge and the identification of the social dimension of knowledge creation (Nonaka 1991, 1994). Nonaka argues that explicit knowledge, i.e. knowledge that can be expressed in words and figures, represents only the ‘tip of the iceberg of the entire body of possible

knowledge' (1994: 16). Tacit knowledge is recognized as an important form, consisting mainly in 'concrete know-how, crafts, skills that apply to specific contexts' (idem.). In regard to the relation between the two dimensions of knowledge, he elaborates a model representing a process of interaction of the two dimensions of knowledge. This model, called SECI, regards the process of the four modes of interaction: socialization, externalization, combination, internalization (Nonaka 1991, 1994). According to Nonaka (1991), such a process is the engine of the so-called spiral of knowledge, i.e. the creation of knowledge within a company. Learning takes place through the mentioned four modes of conversion that describe social practice, a concept that Nonaka uses in referring explicitly to Wenger (Nonaka and Von Krogh 2009).

Nonaka's recognition of the two dimensions of knowledge, the tacit and the explicit, is influenced by the work of Polanyi, which is also one of the sources used by Brown and Duguid (2000b). The latter underline how Polanyi presents such types of knowledge as irreducible to each other: 'Polanyi argues that no amount of explicit knowledge provides you with the implicit', and 'trying to reduce one to the other is a little like trying to reduce two-dimensional drawing to one dimension' (Brown and Duguid 2000b: 134). The authors go on to say that such a position is not exclusive to Polanyi, but is also shared by two scholars who have been particularly influential as regards theories of learning: Bruner and Gilbert Ryle. They cite Bruner, mentioned above (cfr. 3.1) in relation to the concept of 'learning to be', and Ryle in relation to the concepts of 'know that' and 'know how' (ibid.). Further, they hold, 'learning about' on its own does not lead to 'learning to be', nor does 'know that' produce 'know how' (ibid.).

Nonaka emphasizes the importance of the context, an aspect akin to the concept of 'situated learning', using the Japanese term of *ba*, that he defines it as the 'shared context in motion for knowledge creation', paying special attention to the human dimension of learning (Nonaka *et al.* 2000: 14; Jakubik 2011). The *ba* is the dimension that individuals share and use to interact with each other, create knowledge and put it to use (Nonaka *et al.* 2000: 14; Nonaka and Toyama 2007). The *ba* is described as delimited in time and space, but the possibility of virtual contexts is not excluded (Nonaka *et al.* 2000).

As with Dewey, in addition to the context, also the role of the individual is an important element for Nonaka in his later works (Jakubik 2011). He sees each individual as a unique collection of experiences who is constantly changing, and the management of an organization is viewed as the reflection of such continuous activity of change (Jakubik 2011).

The social understanding of knowledge and the role of the individual present in Nonaka's thought can be found also in the works of Brown and Duguid. They hold that the shift towards the recognition of the importance of knowledge in economy should lead to a shift towards people as 'creators and carries of knowledge' (Brown and Duguid 2000b: 21). Referring explicitly to Lave and Wenger, they base their reflections on the empirical work on the formal description of work in organizations (Brown and Duguid 1991). They employ the term 'communities of practice' to refer to informal groups of practitioners that are often not recognized by the organization to which they belong, and that are characterized by being 'more fluid and interpenetrative than bounded, often crossing the restrictive boundaries of the organization to incorporate people from outside' (ibid.:49). They criticize the traditional position held by economists who privilege explicit knowledge and individual learning, and argue that the distinction between knowledge and practice is unsound: working, learning and innovating should be seen not as conflicting forces but as complementary aspects of organizational practice (Brown and Duguid 1991; Duguid 2009). In addition and with clear reference to Bruner's work, they identify the core of knowledge in identity issues, understanding 'learning to be' (a practitioner) as a complementary aspect of 'learning about' (a practice) (Duguid 2009).

### **3.2.2. Challenges in knowledge management**

Challenges in terms of the practical implications of the understanding of knowledge and learning as outlined here have been expressed by several scholars, Brown and Duguid among them (Brown and Duguid 2000b). In their view, in order to foster learning in an organization, it is essential to close the gap between the practice of informal communities, which have to be supported, and the practice as described in the documents elaborated by the management (Brown and Duguid 1991). Here it can be

noted that the suggested indications as to supporting communities of practice, within academic circles as well as those directed to practitioners (e.g. fostering trust and openness, bringing energy to the group and allowing it a certain degree of freedom), have remained fairly abstract (Brown and Duguid 1991; Wenger *et al.* 2002; Iverson and McPhee 2002; Hagel and Brown 2009).

In regard to knowledge management and in a broader perspective, Schultze and Stabell (2004) describe a recently observed position about knowledge management using the dimensions of ‘duality’ and ‘consensus’. The authors specify that duality implies both/and thinking and is associated with pragmatism and theories of practice, whereas consensus implies a social order based on trust and common interest. In such a perspective, knowing is in the practice, and individuals retain only partial knowledge. Thus, knowledge management is essentially the coordination of individual practice into collective action. Similarly, Alvesson and Kärreman (2001) see such an approach as having its focus on the social medium of interaction and on the mode of managerial intervention of coordination, as contrasted within traditional approaches based on techno-structural medium of interaction that concentrate mainly on the organization’s design, and on control.

### **3.2.3. Knowledge sharing across organizations**

Brown and Duguid (2001) argue that, as a consequence of the situated nature of learning, practices are locally embedded and knowledge can therefore be qualified as ‘sticky’. At the same time, in addition to such a local dimension of knowledge, they recognize that knowledge is sometimes transferred more easily between organizations than within, through people who share the same or similar practices (*ibid.*). Such an aspect, referred to by the term ‘leakiness’, leads to the formation of ‘networks of practice’: groups of individuals who engage in the same or very similar practices, but do not necessarily work together and form a community characterized by strong reciprocity and tight coordination (Brown and Duguid 2000, 2000b; Duguid 2009). Brown and Duguid note that leakiness can have positive effects for the individual groups as well as for the area in which the group operates, contributing to stimulate the practice of



communities that may otherwise too close and, in some cases, too conservative (Brown and Duguid 1998; Brown and Duguid 2000a).

The term 'network' is widely used in the business literature to indicate inter-organizational relations. Some studies have emphasized how networking can be particularly relevant for SMEs (small and medium-sized enterprises), at times assuming more personal connotations where sense of affection and moral motivation play an important role; and, more generally, how social capital may be more important than formal mechanisms (Johannisson 1988; Taylor and Thorpe 2004; du Plessis 2008). Several scholars view the potentials of networking and related knowledge-sharing processes as critical for contributing to a region's competitive advantage. One example is the work of Kevin Morgan. With the evolutionary political economy school as point of departure, Morgan has studied knowledge interactions, focusing on the aspect of innovation. The relevance of local and tacit knowledge is stressed, introducing the concepts of 'learning by interacting' and 'learning regions' (Morgan 1996, 1997). Knowledge is also present as an important element in some models of regional development. Within regional economic studies and inspired by the work of Alfred Marshall's studies, Becattini *et al.* (2003) present the model of industrial districts, agglomerations of firms characterized by the importance of the territory and the presence of a primary industry that pervades the community to such an extent as to be comparable to an enlarged family organized as a typical household structure. Not very differently, the model of clusters, presented in management studies by Porter (1998), refers to agglomerations of interconnected firms operating in the same industry and located in a limited geographical area.

In regard to the concept of networking in connection with a region, Brown and Duguid observe that the metaphor of ecology can be adopted, arguing that such a concept provides a systematic perspective characterized by 'shared practice, face-to-face contacts, reciprocity, and swift trust' (Brown and Duguid 2000a). As shown by this quotation, Brown and Duguid are among those scholars who emphasize the importance of localization (Brown and Duguid 1991; Brown and Duguid 2000a; Zhang and Watts 2008; Amin and Roberts 2009). Such a position on spatial proximity has been challenged by recent developments in ICT, but here Brown and Duguid argue that ICT can facilitate communication across space and time across groups that share the same or

similar practices (Brown and Duguid 1998; Brown and Duguid 2000a). At the same time, they hold that the idea that information nowadays is global can be misleading, and argue that knowledge creation is supported first of all by social networks and not exclusively by networks exchanging information digitally (Brown and Duguid 2000a; Brown and Duguid 2002). Other scholars are more positive to the possibility of online communities of practice, while still recognizing several challenges, including the limitations of the tool and the way the community is designed (Kimble *et al.* 2001; Ren *et al.* 2007; Amin and Roberts 2008; Murillo, 2008; Zhang and Watts 2008). Interestingly, recent positions on the relevance of spatial proximity tend to be less polarized than previously, recognizing that practice may come in various spatial forms and, consequently, distinguishing cases according to the kinds of knowledge and actors involved (Amin and Roberts 2009; Gertler 2009).

The question of online interactions and the related possibilities for learning can be examined with reference to the importance of boundaries and peripheries of communities of practice, and, more in general, of weak ties. Wenger argues that the boundaries of a community of practice and its peripheries constitute its points of contact with the world, and, as such, they can offer challenges as well as dynamism to an established community (Wenger 2010). In this context, also infrequent interactions among practitioners through ICT-tools can be important for learning. Similarly and more generally, weak ties can be relevant especially in establishing intergroup connections, facilitating the circulation of information and ideas, and linking members belonging to different groups (Granovetter 1973, 1983).

### **3.3. Knowledge in tourism**

As mentioned in the Introduction, several tourism scholars argue that new developments in the understanding of knowledge have found expression only partly in the literature on tourism. Nonetheless, there are tourism scholars who have adopted approaches based on an understanding of knowledge and related processes similar to those expressed above.

In investigating the adoption of new developments in knowledge understanding in the hospitality literature, Hallin and Marnburg (2008) employ a classification based

on a perspective on knowledge that can be either static or dynamic, and a management objective that can be characterized by measurement, control and storage, or, alternatively, by facilitation and development. Such a classification is similar to the classifications of Schultze and Stabell (2004) and Alvesson and Kärreman (2001) mentioned above. Reviewing some empirical articles, Hallin and Mamburg (2008) conclude that recent developments in the field of knowledge, characterized by a dynamic vision of knowledge and a management based on development and facilitation, are in fact well represented in the literature. However, they also note that various potentials remain in the research field, especially as regards concretization of the aspects of learning climates and knowledge sharing systems.

Without aiming to give an exhaustive overview of such studies, the following sections present some recent contributions in relation to knowledge in tourism, especially concerning SMTEs, the social dimension of learning and knowledge transfers across organizations.

### **3.3.1. SMTEs, communities of practice and teams**

In regard to SMTEs, Thomas, Shaw and Page (2011) observe that, although some studies mention the relevance of knowledge-related aspects, in particular those concerning tacit and explicit knowledge transfer, networks and ICT, this research area is still only emerging. The reason for such neglect is said to lie in the dominance of knowledge-oriented studies in the manufacturing and technology-based industries (Novelli *et al.* 2006; Shaw and Williams 2009). In the context of SMTEs, many contributions in the literature have shown scepticism concerning their knowledge. SMTEs have traditionally been described by scholars as having an environment hostile to new knowledge (Cooper 2008; Xiao and Smith 2007). Not all scholars agreed on this, however: for example, Veijola (2009) observes that small-tourism actors do possess relevant knowledge. According to Veijola, practitioners, especially those working in direct contact with tourists, are important knowledge intermediaries, as they are ultimately the ones who create and deliver the service, staging the tourist experience. Similarly, Valtonen (2009) argues that while the literature tends to refer to SMTEs as problematic from a knowledge perspective, his study of practitioners involved in

outdoor activities showed that they can be viewed as agents of critical knowledge. Thus, 'the smallness of the tourism firm is treated as a structural contributor to the development of a distinctive assemblage of knowledge' (2009:128). Valtonen makes explicit use of the concepts presented in the previous section, in particular the concept of communities of practice.

In line with the understanding of knowledge-related processes as social processes, Hu *et al.* (2009) approach the study of innovation performance focusing on knowledge-sharing at the team level within the individual tourism firm. Using data from employees and human resources managers of international tourist hotels, they conclude that intra-organizational interactions, especially the coordination of employees and their joint 'creative thinking', are essential to the performance of the organization.

### **3.3.2. Challenges in knowledge management**

In regard to the challenges in tourism knowledge management, a model proposed by Cooper, cited by Shaw and Williams (2009) as one of the few studies to have adopted the new understanding of knowledge and related processes, includes two aspects that are clearly related to the issues in focus in the works of Nonaka, Brown and Duguid. One is the recognition of the importance of both tacit and explicit knowledge. According to the author, tourism operators possess valuable tacit knowledge that is sometimes ignored due to difficulties in communicating, transferring and managing it. The other aspect concerns the difficulties involved in the transfer of knowledge between the industry and the academic world. Such an aspect has been noted also by other scholars, who underline the gap between tourism research and tourism practice and the resultant few practical examples of knowledge management principles (see for example Jenkins 2002; Xiao and Smith 2007; Ruhanen 2008).

In line with the considerations about the challenges relating to communities of practice mentioned in the previous chapter, Yang (2007, 2008) proposes a view of management with a form of leadership where the main roles involve facilitating and supporting collaboration and fellowship and coaching the employees, rather than controlling them. Similarly to Wenger's standpoint in regard to the spontaneity of

communities of practice, Yang (2007: 537) states that ‘spontaneous conversation with co-workers’ is the most popular medium for sharing knowledge. The same aspect has been observed by Xiao and Smith (2007) who maintain, on the basis of earlier studies on recreational services, that the most important source of knowledge for practitioners is word-of-mouth with colleagues.

### **3.3.3. Inter-organizational relations at the destination level**

There is broad agreement in the tourism literature as to the importance of cooperation at the regional level and involving tourism actors as well as public authorities. Such cooperation is seen as a factor that can help to improve the quality of the tourist services offered, build a competitive tourist destination and lead to regional development (see for example Van Huylenbroeck and Durand 2003; Cai 2002; Dale and Robinson 2007). The importance of networks contributing to knowledge creation and application has been pointed out by Baggio and Cooper (2010), who note that whereas about ten years ago knowledge management thinking was characterized by the power of *possessing* knowledge, more recent thought considers *sharing* knowledge as power, as it creates communities of knowledge at the destination level.

In a review of innovation studies in tourism, Hjalager (2010) notes the importance of knowledge and cross-sectorial knowledge contacts at the destination level, and describes knowledge as being localized. Further, innovations rarely occur as the result of internal process of individual firms, and the competence and knowledge required are to be found within the cluster of firms at the destination level. Hjalager has also investigated the process of knowledge sharing among organizations in a study of food tourism (Hjalager 2000b). Here the author proposes a model where different types of knowledge are represented as integrated along a developmental path characterized by an increasing degree of cooperation among the various actors, including food producers, tourism operators, policy-makers and researchers. Such a model clearly illustrates the central role accorded to knowledge, knowledge-transfer and also knowledge development as a social process.

Other contributions regarding inter-organizational relations in the tourism literature refer to network theory. Such theory has been widely applied in tourism, employing both quantitative and qualitative approaches, and focusing on a range of aspects, such as destination-building, governance, power and technology (Scott *et al.* 2008). Among the qualitative studies, Cooper (2008) notes how the relevance of networks for learning is a new topic within the tourism literature. In this connection, Cooper mentions the contributions by Saxena (2005) on relations as source of regional learning, Halme (2001) on learning in sustainable tourism, Pavlovich (2003) on knowledge-building through relations with a destination and Morrison (2004) on international tourism.

In the same vein, several authors have pointed out the possibility of applying to tourism already affirmed models and theories, such as those of industrial districts and clusters, many of which focus on the territory and its natural and human aspects integrated in a sort of dynamic and vulnerable system (see for example: Capone 2006; Hjalager 2001; Nordin 2003). With a specific focus on knowledge in its relational dimension are the models of local system of innovation and learning tourism destination (Guia, Prats & Comas 2006; Schianetz *et al.* 2007). Such models are in line with Brown's and Duguid's idea of ecology as a metaphor to represent the systematic and dynamic nature of networking.

Similarly to the considerations noted in connection with knowledge management, Farrell and Twining-Ward (2004) advocate a type of management at the destination level whereby knowledge is accumulated through social learning among various actors. A recent study of cooperation at the destination level stresses the importance of informal relations based on frequent communication, trust, and interpersonal contacts (Beritelli 2011). This can be explained by the presence in the tourism sector of numerous small firms and is in line with previously mentioned studies and other similar studies. for example Pansiri (2008).

Together with communication carried out among cooperative organizations at the destination level, personal contacts with tourism actors, especially information providers in other countries, can be relevant, not least for operators in peripheral areas (Karlsson 2005; Zillinger 2007). In this context, some authors have mentioned the potentials of new ICT tools in facilitating communication among the various actors of

the supply system. Some have noted the possibility of online networks in tourism, which they consider relevant especially where such networks operate at the destination level and include online as well as face-to-face contacts (see for example Buhalis and Molinaroli 2003, Morvillo *et al.* 2006, Breukel *et al.* 2009).

### **3.4. Positioning of the study and joining the research discussion**

This study views knowledge in line with the approach presented in this chapter. Central components of such an understanding are social and situated learning, practice and 'learning to be'. Therefore, the focus of this study is on the social dimension of learning as a process where different types of knowledge are present.

This study aims to contribute to the tourism literature, reflecting on the theoretical approach that can be adopted in the study of knowledge and learning in the context of small tourism actors. In addition, it examines the complex and relational nature of knowledge, seeking to uncover critical factors and develop conceptual tools that might be relevant for tourism development and management in practice.

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#### 4. METHODOLOGY

Methodology is part of the philosophy of science, and its choices are closely linked to ontological and epistemological choices (Goodson and Philimore 2004; Pansiri 2005). In other words, choices concerning the mode of inquiry and knowledge production rely heavily on the researcher's vision of reality and of how to learn about it.

In line with the ontological and epistemological considerations of the theory framework presented in chapter 2, the methodological choices in this study have been inspired by pragmatism. As mentioned in connection with Dewey's thinking in chapter 3, pragmatists see knowledge as strictly related to practice: knowledge is not something that exists and has to be discovered, but is a tool that can be applied to solve problems related to a specific context (Baert 2005). In addition, pragmatists consider that approaching a phenomenon from different perspectives can encourage dialogue, an element that, as mentioned in chapter 2, is deemed crucial in the social sciences (Echtner and Jamal 1997; Baert 2005). Thus, pragmatism does not indicate any mode of inquiry as being more appropriate than others (Baert 2005; Pansiri 2005). While the positivistic and interpretive paradigms identify, respectively, quantitative and qualitative methods as the most reliable, for pragmatists the choice of method is subordinate to the research problem (Pansiri 2005).

Pansiri (2005) observes that quantitative methods have been widely employed in tourism studies; only recently have some scholars become more positive to the application of qualitative methods. They see such an approach as better suited for investigating the dynamics and complexity of the tourism phenomenon (Riley and Love 2000; Jamal and Hollinshead 2001). Seeing the two approaches as complementary, some have also advocated triangulation (Echtner and Jamal 1997; Pansiri 2005).

The main research strategy employed in this study is the case-study approach. As a strategic approach to the field of research, it can be conceptually situated between the methodological paradigm and the more practical techniques related data collection and processing (Lamnek 2005, cited in Webster's online Dictionary 2011). Although sometimes accused of not meeting the requirements of reliability and validity, case

studies are considered to have the potential for using good narratives to generate and convey valuable and practical knowledge, particularly useful in explorative researches and, through in-depth investigations, in conclusive studies as well (Flyvbjerg 2007).

The recommendations presented in Yin's classic *Case Study Research* were used as a guide to arrange and conduct the empirical part of this study. Yin views the case study as a comprehensive research strategy that is primarily focused on the contextual conditions of the phenomenon of interest. He specifies that case studies are appropriate for investigating contemporary phenomena in real-life contexts using multiple sources of evidence.

The case-study strategy adopted in this study can be situated between the methodological choice of pragmatism, characterized by openness and by the relevance assigned to practice, and the practical choice of relying on a range of different sources of evidence, with a focus on interviews with practitioners and observations of their activities.

The following pages present a short description of the context and a specification of the organization of this study in four delimited studies. The context is described in section 4.1 and is based on secondary data, mainly quantitative measurements relating to the geographical area of interest. The four studies are presented in section 4.2. A brief introduction is given for each study, together with the presentation of the research questions. Section 4.3 concerns the conduct of the empirical part of the studies presented in section 4.2, with some considerations as to the sources of evidence and the analysis of the data. Section 4.4 presents some considerations about the tactics adopted in order to fulfil the requirements of validity and reliability. Finally, in section 4.5 some personal considerations about reflexivity are presented.

#### **4.1. Identification of the context**

The funding of this study has restricted the field of research to a context relevant for northern Norway. Thus, most of the cases have been chosen from this geographical area.

Northern Norway has many of the characteristics of rural and peripheral areas as presented in the Introduction. At the same time, as part of a prosperous country, it does not present the typical difficulties of other peripheries, like an unreliable or non-existent communication system or high unemployment rates.

Northern Norway comprises three larger administrative districts, or *fylker*: Finnmark, Troms and Nordland. The total area covers 112 496 km<sup>2</sup>, and counts approximately 464 649 inhabitants, for a population density of ca. 4.1/km<sup>2</sup> ([http://no.wikipedia.org/wiki/Nord\\_Norge#cite\\_note-0](http://no.wikipedia.org/wiki/Nord_Norge#cite_note-0)). The communication and transport system is in general good, with many small airports in addition to frequent bus and boat services. However, mention should also be made of some negative trends: outmigration (<http://www.ssb.no/ssp/utg/200905/02/>), several small settlements with negative population growth (<http://www.ssb.no/ssp/utg/200905/02/>) and lower rates of higher education than for the country as a whole (<http://www.ssb.no/emner/04/01/utniv/tab-2011-06-09-01.html>). Unemployment is in general very low and varies slightly in respect to the national level (2.2%) (<http://www.ssb.no/emner/06/03/innvarbl/tab-2011-05-11-04.html>). Also coverage as to social services varies in the three districts, but is generally close to the national level (<http://www.ssb.no/soshjelpp/tab-2002-12-19-01.html>). Major tourism attractions are the elements of untouched nature, wilderness, and various possibilities for outdoor activities and exotic scenery.

## **4.2 Research questions and presentation of the studies**

As mentioned, the questions guiding this research are:

1. How can learning among small tourism actors be conceptualized?
2. What knowledge-related factors are critical for the development of small-scale tourism in rural and peripheral areas?

Four studies have been conducted, each contributing to answer to one or both research questions.

The first study discusses the potentials of Wenger's theory of Communities of Practice in the study of cooperative groups of small tourism firms. As noted in chapter 2, the concept of 'community of practice' has been recently applied to the study of tourism practitioners. The present study discusses such an application, outlining its critical aspects and illustrating it with a case study. The sub-question thus asks: *which are the potentials of Wenger's learning theory of Communities of Practice (CoP) in the context of cooperation between small tourism actors?*

The second study concerns ICT, investigating whether modern social media can play an important role in terms of networking and, in particular, in the acquisition and sharing of knowledge among small tourism operators. The sub-questions are: *Which role, if any, do social media (in particular Facebook) play in knowledge acquisition and sharing among small tourism actors? Why, how and with which result do formal networks of small tourism actors use social media?*

The third study concerns wildlife tourism, a form of nature-based tourism centring on tourist interaction with wild animals. Here we investigate the challenges and critical factors for the development and management of a form of wildlife tourism that integrates natural sciences knowledge into the tourist experience. The sub-question is: *what are the challenges and the critical factors for the development and management of a form of wildlife tourism that is based on an active and practice-near role of natural sciences knowledge?*

The fourth study concerns food tourism, a form of tourism in which food features as one of the motivating factors for travel. This part of the study aims to map relevant types of knowledge and investigate their roles. The sub-question: *which types of knowledge are present in food tourism and what roles do they have in its development and management?* In addition, this study *proposes a conceptual model that can be applied as a theoretical tool for decision-making in tourism development.*

### **4.3 Conduct of the empirical studies**

The research methods adopted in this study follow from the sub-questions presented above, and are developed according to the advice and guidelines given in Yin (2003).

As to the objective in applying the case-study approach, the first case study aims to illustrate, while in the other studies the aim is to explore and describe.

An important characteristic of case studies involves the deep understanding that they can provide, and that such understanding often derives from data collected through multiple sources of evidence (Yin 2003). For all the studies presented here, fieldwork was conducted, in order to collect empirical data about the context and the cases. The sources of evidence employed in all the studies include both primary and secondary data. Secondary data were collected through searches on the Internet, or accessed through the university library services. Such documents include reports by regional and national organizations, newspaper articles and promotional material. These data were employed in order to get information about the context and the specific cases, so as to prepare a protocol for each case study and plan the fieldwork periods. In some cases secondary data were collected during fieldwork periods, for example, in the study of wildlife tourism, data on tourist feedback in the guest book.

Primary data were collected through interviews and observations, generally conducted during fieldwork. Most of the interviews were semi-structured way. Interview guides were used, with pre-formulated questions and a flexible checklist in order to ensure that important topics were covered. Most interviews were performed face-to-face, usually at the working place of the respondent and in the respondent's mother tongue. Observations were carried out during approximately in the same period as the interviews. In the study of wildlife tourism, participant observation was performed and data were documented through fieldnotes written immediately after observation. The study about ICT involved a virtual form of observation.

The data analysis necessitated transcription of the interviews, and a process of bringing order, structure and meaning. This was done in line with the topics outlined in the protocol. Contact was maintained with most respondents during the data analysis process. Some respondents received the draft of the report of the case studies and were asked for feedbacks and comment. Data from observations were analysed in a similar way. This resulted in a database, partly electronic and partly on paper, and, finally, in a case study report for each case.

#### **4.4. Validity and reliability**

Several tactics indicated by Yin (2003) as quality criteria for research design in terms of validity and reliability were adopted. To ensure quality in terms of reliability, a protocol and a database were developed for each study. In the planning phase, the protocols served to make order among the concepts that had emerged as relevant during a preliminary theoretical study of the research field. This phase concluded with the development and specification of the research questions. In addition, the protocols contained practical information, such as information about the informants and a calendar with important dates and deadlines, general procedures to follow during the fieldwork and the interview guides. During the collection of the primary data, the protocols functioned as a journal, including short notes taken after the data collection. The protocols also served as starting points for developing the databases for each case.

In regard to construct and internal validity, key informants were used to review the drafts of the case studies reports, and multiple sources of evidence were used. In addition, the analysis phase was quality-tested using peer review by the journals to which the studies were submitted and the scientific committees of the conferences where some of the studies were presented.

External validity was taken into account in terms of transferability, aiming not to generalize the results but to enable extending the research findings to other similar contexts (Decrop 2004; Flyvbjerg 2007). The criterion of transferability was met through in-depth investigation, devoting some time to become familiar with the individual cases, and also choosing cases based on certain characteristics deemed advantageous. The latter aspect is commented on in the next section.

#### **4.5. Reflexivity**

In qualitative research inquiries, particular attention must be paid to aspects related to the personal characteristics of the researcher. The collection of data through interviews and observations, but also the choice of perspective for the research, both in the beginning of the research process and in the final part of analysis and discussion, will be influenced by the researcher's characteristics, her interests and competence, her cultural

background, gender and age. The process through which the researcher reflects on her characteristics and makes them explicit, for herself as well as for the audience, addressed in the literature with the term 'reflexivity', constitutes one way to deal with such an aspect (Rose 1997; Goodson and Phillimore 2004).

In the choice of the theoretical and practical approach to this study, the researcher's academic and cultural background has played an important role. With my training within Business Administration and Pedagogy, the choice of studying tourism from a knowledge perspective, attempting to adopt some of the ideas developed and broadly adopted in the named fields, has constituted a natural choice. Cultural background and personal interests have guided the choice of focusing on certain forms of tourism instead of others.

While the researcher's personal characteristics have certainly influenced the fieldwork, for example how the interviews were performed and the data obtained, it is less easy to identify how or with which results this took place. Here the researcher can only rely on her 'gut feeling'.

One element of perhaps special influence during the fieldwork concerns the researcher's nationality. In general, being a foreigner living in Norway and working for a Norwegian university seemed to serve to locate the researcher in the minds of the informants in a category somewhere between the 'foreigner tourist' and the 'Norwegian academic'. In some cases, being a foreigner seemed to awaken the curiosity of the respondents, who enjoyed spending some time being interviewed by a person they seemed to perceive as an 'unusual and curious tourist'.

Obviously, my being Italian influenced the fieldwork of the study concerning food tourism. It can be added that this cultural background was a facilitating element not only in the investigation of the Italian food case, but also in the Norwegian case because many informants showed a particular interest in Italy and because on some occasions the researcher could offer her assistance as a translator.

Being a foreigner living in Norway was perceived as a common element with some of the informants, like the main informant for the study of wildlife tourism. Here the researcher's previous acquaintance with the informant also helped considerably in

gaining access to the field and made communication easier. At the same time, as well as in some cases where similarities in age, gender and interests were present and contributed to establish a form of personal, albeit superficial, relation with the informants, objectivity became a challenge. However, when balanced with critical sense, personal involvement can be related to what in the literature is referred as 'empathetic insideness', a more realistically attainable condition than one of pure objectivity (Tantow 2011).

On the negative side, being a foreigner might have prevented informants from talking about certain issues – they might have assumed that, being an outsider, the researcher would not understand them. Another negative element might involve the tendency of respondents in talking with outsiders, especially tourists, to emphasize the positive aspects and minimize the negative ones.

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## **5. STUDIES**

### **5.1 The Communities of Practice approach to cooperation in terms of knowledge and information sharing and learning among SMTEs**

- Bertella, G. (2011) Communities of Practice in Tourism: Working and Learning Together. An Illustrative Case Study from Northern Norway, *Tourism Planning & Development*, 8(4): 381–397.

### **5.2 New ICT: online knowledge and information sharing**

- Bertella, G. (2011) Networks of small tourism actors going online: the case of the ‘Innovative Experiences’ network. 1) Long abstract published in J. Crofts, V. Magnini and A. Zehrer (eds), *Proceedings of the 2011 Conference on Social Media in Hospitality and Tourism*, pp. 8–9 (ISBN: 978-0-615-56225-4). 2) Manuscript submitted to *Journal of Hospitality and Tourism Technology*.
- Bertella, G. Online knowledge acquisition and sharing: an exploratory study about small tourism actors’ use of Facebook. Manuscript.

### **5.3 Natural science knowledge and wildlife tourism**

- Bertella, G. (2011) Wildlife Tourism and Natural Sciences Knowledge: Challenges and Critical factors, *Scandinavian Journal of Hospitality and Tourism*, 11(1): 97–114.

### **5.4 Knowledge in food tourism**

- Bertella, G. (2010) Knowledge in food tourism: the case of Lofoten and Maremma Toscana, *Current Issues in Tourism*, 14(4): 355–371.
- Bertella, G. (2011) A knowledge-based model for the development of food tourism. 1) Long abstract published in R.F. Romano (ed.), *First European Conference on Wine*

*and Food Tourism*, Proceedings, Volterra (Pisa), Italy, 13–15 April 2011, pp. 13–16, (ISBN: 978-884672967-5). 2) Manuscript.

**5.1 The Communities of Practice approach to cooperation in terms of knowledge and information sharing and learning among SMTEs**



## **5.2 New ICT: online knowledge and information sharing**







### **5.3 Natural science knowledge and wildlife tourism**



## **5.4 Knowledge in food tourism**



## **6. DISCUSSION AND CONCLUSIONS**

This chapter relates the findings of the four studies presented in the previous chapter to the research questions, discusses them and, finally, offers some conclusions.

Sections 6.1 and 6.2 attempt to integrate the four studies and relate their results to the research questions:

- 1) How can learning among small tourism actors be conceptualized?
- 2) What knowledge-related factors are critical for the development of small-scale tourism in rural and peripheral areas?

Section 6.3 is based on what has been presented in the previous sections and offers a discussion of the results of the studies as a whole. Finally, section 6.4 presents the conclusions of this study, theoretical and practical contributions and directions for further research.

### **6.1 How can learning among small tourism actors be conceptualized?**

The first study proposes using Wenger's theory of communities of practice (CoP) to study cooperative groups of small tourism actors and concludes that such a theory can be fruitfully applied, especially in cases where knowledge resources are limited and identity plays a crucial role as part of the tourist product. This suggests that important elements of the learning process are the sense of belonging to a territory, the sense of togetherness within groups of practitioners, the meaning attached to the practice and the presence of non-profit motivations and goals. Also the other studies indicate that such elements are being important for knowledge-related processes. Identity and the sense of belonging to a territory emerges as relevant in the study about food tourism, no least as regards creating a strong commitment in the context of the valorization and exploitation of local resources (here: food traditions), and facilitating local networking. In regard to the latter aspect, further discussed in the next section, the study of wildlife tourism shows that a strong attachment to the local context need not derive from belonging to a

social context, but can be related to the natural aspect of the specific context. In this case, non-profit motivations and goals, relating to environmental protection and to science as a lifestyle, emerge as particularly relevant.

We see that the multifaceted aspect of knowledge is an important element of learning in the tourism context. This is especially evident in two studies: the one on wildlife tourism and the one on food tourism. In the latter study, five types of knowledge are identified as particularly relevant for the development and management of the specific form of tourism investigated: scientific knowledge, local and global managerial knowledge, tourism knowledge and food knowledge. By contrast, the wildlife tourism study focuses mainly on scientific knowledge. Here the findings show that the integration of scientific knowledge with the type of knowledge related to local patterns of networking and cooperation, described as local managerial knowledge in the food tourism study, is particularly important for the development of a form of tourism that can be seen as sustainable. The wildlife study also shows the relevance of competence in terms of interpretation, including communication skills and the capacity to get tourists emotionally involved.

We also see that contacts and relations among various different types of actors are crucial for learning. The model for mapping available knowledge resources presented in the food tourism study is particularly significant in this regard. The main idea is that different actors possess different types of knowledge that are complementary for the development and management of a sustainable and high-quality tourist offer. The food tourism study also indicates that recent developments in ICT have the potential to influence the knowledge-related process. This element is investigated in a separate study focusing on the use of social media. It shows that, when the basic ICT skills are present, such tools can facilitate the acquisition of information and learning by observation. In addition, this study suggests that social media can contribute to the creation of contacts and the nurturing of social relations, helping to expand personal networks, reinforcing social relations among colleagues and strengthening their sense of togetherness.

## **6.2 What knowledge-related factors are critical for the development of small-scale tourism in rural and peripheral areas?**

From the considerations presented in the previous section, a critical factor for the development of tourism can be identified in the recognition and availability of relevant types of knowledge. As concluded in the food tourism study, such types of knowledge can be identified through analysing the specific context. We find that local knowledge about the territory plays a crucial role for the development of tourism. Limitations in this regard can exist due to forgotten traditions, as partly shown in the case presented in food tourism study. Although not explicitly investigated in this study, and only mentioned in the study about the communities of practice framework, identity issues relating to possible indigenous communities can also be assumed to be critical in this context. Other difficulties in identifying and exploiting the knowledge-related resources of a specific context can emerge when local actors show little willingness and/or capacity to communicate and work together. In regard to such an aspect, and closely related to what has been described as local managerial knowledge, the wildlife and food tourism studies show that some limitations can be due to non-cooperative patterns and conservative attitudes.

A critical factor, particularly problematic in rural and peripheral areas, concerns the availability of scientific knowledge. This type of knowledge can play an important role in terms of innovation, as seen in the food tourism study, and in terms of conservation of the local context, both cultural and natural, as seen in the wildlife tourism study. The latter study shows that also when scientific knowledge is available, it can be difficult to integrate within tourism at the destination level, due perhaps to difficulties in communication and cooperation among actors from different fields and with different backgrounds.

The food tourism study shows that managerial knowledge at a level that goes beyond the local context can supplement possible shortcomings in terms of knowledge. This also indicates that the possible relevance of modern ICT. On the other hand, the study specially focusing on ICT does not confirm this, showing instead that contacts are not easily created or maintained exclusively through ICT. Crucially important here is the presence of an actor who can create, maintain and coordinate such contacts and financial resources for arranging offline meetings.



### **6.3. Discussion**

In order to answer the research questions to which the findings of the four studies have been related above, this section discusses the results of the study in light of the theory considerations presented in chapters 2 and 3. The discussion leads to the elaboration of two models, one static and the other dynamic, about learning in tourism, more specifically about the relevant interactions, arenas and processes and the critical factors.

This study has approached the study of tourism actors located in rural and peripheral areas from a knowledge perspective. Influenced by the ideas by some educational and business scholars, in particular Dewey, Wenger, Nonaka, Brown and Duguid, the understanding of learning employed here has its main components in the concepts of learning as a social and situated process, and knowledge as competence in regard to a meaningful practice. Within the tourism literature, this study is in line with the position held by scholars like Tribe, Hjalager and Cooper regarding the relevance of different types of knowledge and cooperation among different types of actors. In regard to small tourism firms, this study distances itself from studies focusing on the lack of knowledge and geographical isolation as typical limiting characteristics of such firms. In this sense, this study's position is close to that of Tribe concerning the underestimation of the relevance of procedural knowledge, and also to the position espoused by Veijola and Valtonen (chapter 3), who approach the study of tourism as a practice.

The findings of this study have confirmed the importance of the competence gained by small actors in their firms' everyday activities, for example in terms of interpretation. Also the process of learning as a social process among practitioners is recognized as an important element, for example in terms of adjusting various aspects of their services as a consequence of discussions among colleagues.

In small firms, the same individuals often hold both operative and strategic positions. The findings show that some small actors are highly competent in relation to strategic activities, product development in particular. In regard to such an aspect, not only the type of knowledge found among small actors, usually in the form of local know-how, but also their commitment, related to their non-profit motivations and goals, is decisive. Such an element can be seen as a form of attachment to the social and/or

natural context the individuals feel to belong to. Our findings suggest that this aspect can have particularly positive consequences. In many cases, small tourism actors show deep commitment to their firm. They tend to be active in the search for competence and any skills they might lack in order to secure a future for the firm and to be competitive. This is the case with small actors who work actively to find collaborating partners, to locate financial support for implementing their plans and to participate in regional projects.

The findings suggest that these small actors' sense of belonging and their non-profit motivations and goals also lead to a concern with the context. Such a concern goes beyond the borders of their firms, and involves primarily the desire to develop a form of tourism in the local area that can contribute positively to the community. We have also seen that, although interested and motivated, small tourism actor may have plans and ideas that do not always develop into action, or only limited, as in the form of collaboration with colleagues to develop tourism packages, or cooperation in terms of directing visitors to other tourist attractions in the same area.

This study has shown how the willingness to cooperate is not always present, but is relatively diffuse. In general it seems correct to say that, according to their capacities and constraints in terms of time and finance, small actors are usually willing to get in contact, and, eventually, develop cooperative relations with other actors, and that this happens in a spontaneous and informal way. Actors connected by strong ties can spontaneously create groups that can be seen as communities of practice (CoP). Alternatively, groups characterized by not particularly strong ties and by the same practice can also be formed, and, to use a term adopted in the literature, can be termed networks of practice (NoP). Based on the understanding of knowledge and learning presented in the previous chapters, CoP and NoP can be understood as the social arenas where learning takes place, in some cases leading to collaborative and/or cooperative actions. At this level, the major critical factor is the existence of relatively extended personal networks that can serve as the starting point for finding actual partners. Barriers in this sense can be present when the specific actor is an outsider and/or has characteristics that might be viewed with scepticism, especially in small communities.

Another critical factor can be the lack of resources necessary for the planning and implementation of shared projects, including financial resources and time.

Particularly motivated operators might manage to progress with their plans and actions independently, as stated by a respondent in the study about CoP, but we may assume that this is not always the case. In addition, the findings show that it is challenging for small tourism actors to develop relations with actors who do not share the same practice and/or do not belong to the same territory. This element is critical as, according to the understanding of sustainable development as a knowledge-based set of practice, the interaction and collaboration of different actors is crucially important.

### 6.3.1 A static model about learning in tourism

Using the variables of practice and territory and attempting to summarize the reflections presented above, a model representing the different types of interactions of tourism actors and the related learning arenas can be presented (Fig. 1).

	<b>Same territory</b>	<b>Different territory</b>
<b>Same practice</b>	CoP	NoP
<b>Different practice</b>	Clusters/ districts	Networks

Fig. 1 A classification of the interactions that tourism actors can engage in

In the model the two arenas that have been qualified as more favourable for learning are represented in the first and second cell: communities and networks of practice. Interactions among actors represented in the third cell share the same territory but have different practices, as is the case with tourism operators interacting with local politicians and administrators. Interactions among such actors are likely to happen and can develop into the creation of clusters/districts. Such arenas are identified as less favourable for learning, because of various obstacles. Although the territory can act as a common domain of interest and communication platform, difficulties related to the lack of willingness and/or capacity to communicate and work together can be present. The fourth cell is occupied by interactions among actors belonging to different territories

and having different practices. Also such interactions can be relevant for tourism actors, for example the interactions of localized tourism practitioners and tourism scholars. In such a case, indicated by the generic term of 'networks', learning becomes a challenge, due to differences in interest and communication. All four types of interactions can contribute to learning and, in the case of CoP and clusters/district, are directly related to developing tourist destinations sustainably.

### **6.3.2. A dynamic model about learning in tourism**

As to the dynamics of the development of the identified types of interactions and learning arenas, small actors who are positive to collaboration tend to look for partners among those they know already and with whom they share similar backgrounds. In order to develop contacts and progress to cooperative relations that go beyond their personal networks, small actors rely on the presence of a project and/or a similar initiative at the regional level. The presence of such projects and initiatives, often involving public actors, is appreciated by small tourism operators. Such projects can be decisive in bringing together different actors in a CoP or NoP fashion, facilitating their interactions and coordinating their actions.

Actors from the research milieu have a special role to play here. The findings of this study and the researcher's own experience indicate that tourism actors, both private and public, are generally curious and positive to establishing contacts with such circles, and engage in discussions when the interest is reciprocal. The relations initiated within such broader networks tend to develop and be characterized by fairly weak ties. This study has shown that such relations can be created and maintained through modern ICT. As to an approach for the study of tourism at this level, the models of cluster and district, including actors with different practices within the same area, could be appropriate. Some of these relations may develop into deeper relations and can constitute the basis for further learning.

Based on the discussion above, the following model can be presented with the intention of illustrating learning as a process of networking at different levels (fig. 2).

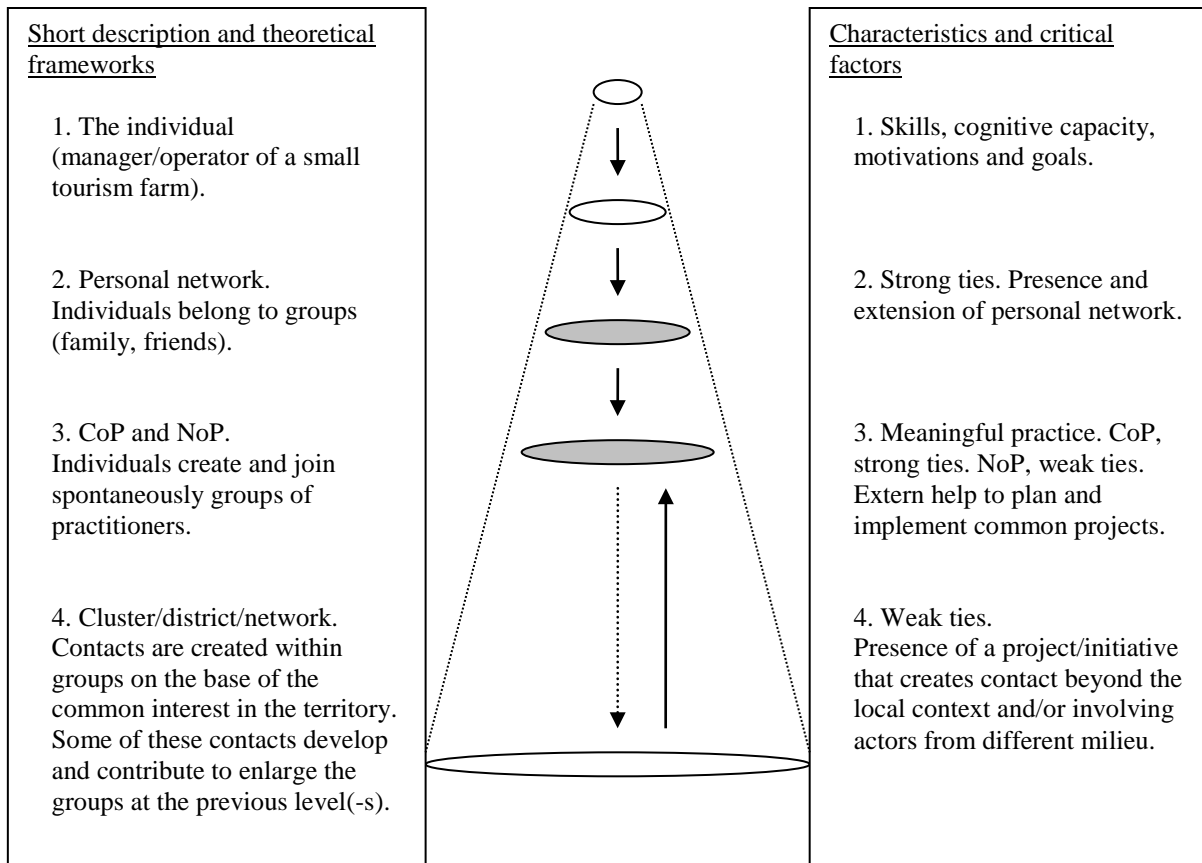


Fig. 2. An illustration of learning as a social process of networking

Four levels are represented: the individual level, the level relating to the personal network and consisting mainly of friends and family, the level of spontaneous and usually size-limited groups of practitioners, and, finally, the level of larger groups of actors who share the same domain of interest in the territory or type of tourism. On the left side of the figure, a short description of such levels is presented together with an indication of the theory frameworks that can be adopted. On the right side of the figure, characteristics and critical factors are indicated for each level. The cone departing from the first level and reaching the fourth level represents the networking related to a person, more specifically the manager/operator/owner of a small tourism firm, and his/her potential in terms of learning. The first and second levels refer, respectively to the individual, with his/her knowledge, motivations and goals, and his/her personal network, involving people with whom that individual has close relations. The third level refers to the spontaneous groups the individual joins in order to work together with people who share the same practice. Such groups, coloured in the figure, tend to be formed by some of the people mentioned before, or with people who have the same

practice but with whom the individual does not have especially close relations. In the first case such groups can be seen as communities of practice (CoP) and in the second case as networks of practice (NoP). As noted above (see also fig. 1), and understanding learning as a social process strictly related to a practice, it is in such groups that learning is more likely to take place. Within CoP, learning is thought to engage the participants in a deeper way than within NoP, so cooperation may take the form of collaboration. The fourth level represents the broader networks formed through contacts, sometimes developed on the basis of the common element of the territory and sometimes on the basis of a more general interest in tourism. Such groups can be the result of regional projects or similar initiatives and are characterized by fairly superficial contacts. However, some of these contacts may develop and contribute to enlarge the above-mentioned groups.

#### **6.4 Conclusions**

The main conclusion about knowledge and learning to be gained from this study is the identification of the relevance of spontaneous and informal groups based on the common domain of interest of the territory, and the common practice of tourism. Such groups are described as communities of practice (CoP), in the case of strong ties among the members, and as networks of practice in the case of weak ties (NoP). Critical factors for the creation and functioning of such groups are the existence of an extended personal network, and initiatives at the destination level that can create further contacts beyond the destination that may develop into deeper relations and be relevant for learning.

The main theory contribution of this study lies in its discussion of the approach and framework that can be adopted for the study of learning in tourism. Such a discussion is intended to contribute to academic reflection on the theory approaches suitable for the study of small-scale tourism.

In regard to practical contributions, the model presented in the study of food tourism offers a conceptual tool that can be adopted in mapping the knowledge-based resources of an area. This particular model concerns the case of food tourism but can be

adapted to suit other forms of tourism. Other practical implications concern the type of management to adopt at different levels. This study has shown that, in the context of spontaneous and informal groups, identified as important learning arenas, management can work to create and support such groups, relying on relations based on trust instead of control, and emphasizing and encouraging not only profit but non-profit goals and motivations as well. On the other hand, at the destination level, a certain degree of control and coordination can be important for involving actors from different milieus, facilitating communication and creating meeting arenas.



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