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Government, Local State and Private Sector Groups' interaction in the Context of Producing Sport Tourism Policy in Greece: A strategic perspective

Purpose of the study: The present study aims to investigate the broader influential industry and public administration environment in the context of determining the extent and potential of sport tourism developments in Greece. Method: Formal interviews with a wide range of top officials from all levels of sport tourism policy making and implementation are employed to highlight the parameters influencing sports tourism programs in the context of differentiating the saturated tourism product. Findings: The study reveals the difficulties of transforming the existing central and local government structure towards establishing a sports tourism developmental policy scheme within a hesitating traditional tourism environment. Practical implications: While those forces determining the nature and scale of tourism developments are highly interdependent and at the same time defensive, this by no means minimises the importance of attempting to design and implement mechanisms that would shape the future in ways that increase the possibility that desirable, sustainable sport tourism programmes can be realised. Originality/value: The results of the present analysis are generalizable, or at least useful, to other mass tourism destinations in the Mediterranean, which are developing sport forms of tourism.

Key words: sport tourism policy, tourism development, central government, tourism business.

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Introduction

Although the Greek national economy has undoubtedly benefited from the development of tourism, this has clearly not been without its problems and costs. Internal political and personal differences, the rapid and uncontrolled mass tourism development, along with the dramatic increase of inflation, lack of essential investment in infrastructure and cuts in subsidies, have generated a series of problems and inefficiencies within the Greek tourism product. Even though the Greek literature acknowledges the contribution of tourism to Greek national income and employment, it remains very critical of tourism policy, where the development was based on the uncontrolled exploitation of essential resources (Litras, 2008).

Analysing the causes of developmental degradation, Litras (1991) noted that the lack of long term planning and the philosophy of the 'easy profit' created an anarchic tourism development which ignored preservation of resources and environmental catastrophe. The consequences of this unplanned 'policy' brought about market instability and some decreases in the numbers for the Greek tourism product by the early 1980's. The realisation of the need for effective intervention and redirection of Greek tourism came after a series of negative effects, which have been relatively well analysed in the literature of the second half of the 1980's and 1990's. The Greek literature (Litras 2008, 1991; Tsartas, 1991; Tsekouras, 1991) views the country's main tourism-related problems as: (a) the seasonality of demand; and (b) the concentration of tourism activity in certain areas, resulting in:

- tourism depending on international trends;
- urbanisation of the countryside building on rural land;
- degradation of natural resources, pollution, environmental damage; and
- overcrowded infrastructure;

Additionally, the inability to compete in the international market effectively when the dramatic increase of illegal and low quality accommodation units, results in poor quality services bringing an image of a cheap holiday destination' (Pilarinos, 1992).

Analysis of the policy statements of the Greek Ministry of Tourism (GNTO) during the 1990s, despite emanating from different political parties, present similar views on the implementation of the new policy approach, highlighting for example:

- ✧ protection of the physical and cultural environment;
- ✧ common financial and organisational co-operation between the authorities of both public and private sectors;
- ✧ control and limitation of tourism development in over-developed and overcrowded areas;
- ✧ controlled development in areas of special environmental value;
- ✧ development in areas with presently low levels of tourism, but high future tourism potential (e.g. north Greece, Macedonia, Thrace);
- ✧ completion of general and essential infrastructure, (airport, ports, motor-ways, communications), along with a sustainable improvement of services that respect the physical and cultural environment;
- ✧ creation/completion of special tourism infrastructure (marinas, conference centres, golf courses, ski-resorts, spas etc.);
- ✧ educating and increasing the awareness of tourism professionals about the new trends that influence the tourism process;
- ✧ preservation of national heritage and cultural values.

The need for product differentiation is now heavily emphasised in contemporary Greek tourism literature, identifying the need for 'a common consciousness' that emphasises the new quality goals and considers, with great attention, the question of which kind of new

‘quality’ product can be offered to the international tourism market in order to achieve the maximum economic and social benefits (Igoumenakis, 2007). This common consciousness includes an awareness of the importance of physical, cultural and environmental protection, on which the tourism products are ultimately based on and are dependent.

The value of sport tourism must be seen in the context of the time and spatial distribution of tourism activity in the Greek area (Delpy, 1998). The creation of demand at the off-peak months of the tourism period and the attraction of visitors of high socio-economic status (Vagionis, 2007), are the two main arguments put forward for attracting sports tourism in the limited Greek literature. Following a European tourism market research study referring to ‘sports tourism’, the GNTO (2005) argues that investment in sport establishments increases the level of customer satisfaction, improves the prestige and competitive image of hotels, which subsequently enjoy increased revenues and high quality customers. The same research criticises the inferior condition of the present sporting facilities in most Greek hotel units, but emphasises the great potential that Greece has to attract sport tourists through strategic marketing, special infrastructure and effective promotion.

Most analysts of this field argue that the current lack of special infrastructure prevents sports tourism development, despite the existence of a unique physical environment in which it could easily be established (Hudson, 2003). However, Vrontou (1997) suggests that this process is already emerging, identifying the increased trend for the ‘sport’ ingredient in holidays. Leivadi & Vrontou, (2006) are offering a long list of private companies that provide sport equipment for hotel units, a fact that indicates the increased entrepreneurial interest. The materialisation of sports tourism programmes (like sea and golfing holidays) through public mechanisms, take time and are sensitive to the political inconsistencies that succeeding governments bring (Houlihan, 1991). However, it is possible to find examples

where public local authorities, realising and appreciating the economic potential of this active tourism trend, have introduced sporting activities and schemes throughout the tourism season (Gibson, 1998).

One of the most significant determinants now, of whether this potential can be realised, is that of the extent that public sector drivers of this tourism policy have recognised and can implement appropriate programmes and supporting legislation, incentives etc.; and also the extent to which the industry is amenable and foresightful enough to acknowledge the benefits of such policy and product shifts; or whether the short term profitability of the existing mass tourism products will cloud their identification and realisation of the changing needs of both the European tourism market and the host country's physical and social environment.

Defining the challenge of a sports tourism development in Greece

Greek regions, both those touristically developed and those emerging, are affected by the new policy announcements regarding improvement of their tourism product, focused on producing a 'quality' offer and targeted at higher spending segments of the market (Igoumenakis, 2007). The nature of a destination's tourism product clearly determines the type of market attracted and, in this sense, the tourism market has always been supply-led (Bull & Weed, 1999). Mapping an explicit tourism policy towards a sport and recreational product demonstrates the belief that quality (higher spending) clientele would be attracted by what is on offer (Vrondou & Kriemadis, 2006). Promoting sports activities such as yachting, golf and skiing which are widely associated with high earning and high social status groups, the tourism policy aims to influence the 'quality' of the market, as well as the product (Sport Events City Network-SECN, 2006). In order to achieve the new public sector objectives of regeneration and sustainable development, sport tourism is expected to play a major role in

strengthening traditional regions and enhancing the development potential of less developed areas, particularly in taking advantage of some of their unspoiled natural features and their cultural capital (Standeven and De Knop, 1999).

Examining the different tourism environments that of the administrative and tourism centre of Athens, the traditional mass tourism business the study aims to offer a more comprehensive understanding of the potential for sport tourism development and the re-imagining of a Greek product, that does not have to be constrained to offering sun-sea products. A comprehensive insight into the potential for sport-related tourism development to assist in regenerating a stagnating tourism product becomes this study's objective that is achieved through the examination of the different tourism and broader policy environments: i.e. the central government tourism departments and associated policy environment, representing the state or 'central' viewpoint; and quite differently, the representative local governments. Additionally, the study aims to examine the reaction of the tourism industry through the leaders of the collective tourism bodies in order to evaluate their willingness to move towards a product differentiation process through a sport tourism dimension for Greece.

The investigation into the potential for sports tourism development in Greece has highlighted a number of key areas which will be influential in determining the extent, nature and timescale through which sports tourism programmes may be established, within the broader repositioning of the Greek tourism product. These influential areas include: central policy making, European policy guidelines, local reforms and private sector initiatives, all of which are deemed to be factors interacting in a catalytic way for the establishment of this type of development (Weed and Bull, 1998). A further requirement in the current context is that such programmes must be established through a sustainable development perspective in order to produce a viable tourism product.

The study presents the key findings of the research undertaken in Greece, mainly derived from the formal interviews with significant actors in the Greek tourism industry and administration. The main areas addressed are: a) an evaluation of the potential for Greece to sustain its tourism profile through the development of a sports tourism product; b) the position and the response of key actors and agencies to the changing tourism environment and the emerging proposals for sports tourism development; c) the developmental path suggested by key actors of the private sector and the level of adjustability of the industry to the new practices; d) the barriers identified in the process of repositioning Greek tourism to include and highlight sports tourism product development and overall, e) the interacting relationships of the different groups towards the production of feasible and acceptable policy practices for sport tourism in Greece.

In a wider sense all these areas represent either the range of problems or future potential that Greece is confronting in order to rejuvenate its tourism products in the face of changing market trends and declining growth in interest for traditional, over-concentrated, tourism products.

Methodology

A theory evaluated as being appropriate for the purposes of adopting a theoretical basis within this study, is the concept of 'Policy Community', defined by Richardson and Jordan in 1979 as "the relationship involved in committees, the community of departments and groups...that perhaps better accounts for policy outcomes than do examinations of party stances, of manifestos or of parliamentary influence". Policy Community has been used rather liberally to describe all types of group-government relations. There is no real distinction made between the intensity of these relationships, and the community is viewed as being relatively open. Houlihan's (1991) view of a 'Policy Community' is one that takes the

span and intensity of issue interest/control as being defining characteristics. Policy actors with a direct or indirect interest in the policy or implementation field, include those who own, manage or work for organisations in the relevant industry; i.e. governmental organisations, local authorities, private enterprises, pressure groups etc.

The combination of semi-structured interviews and document analysis is used here for reasons of enhancing validity, through the process of ‘triangulation’, where, according to Kirk and Muller (1986), reliable evaluation is achieved by comparisons of data elicited by alternative forms. For the purposes of this study, the triangulation of data, as well as of method, was used to enhance the credibility of strategies used and the data produced.

As the purpose of the study is the examination of sports related tourism policy issues, the need to include all levels of policy dictated the need for representation of the relevant bodies at both central government and private sector levels (Hall and Jenkins, 1995). This included the Greek Ministry of Tourism (GNTO) at central government level and relevant departments within the respective structure. With reference to the requirements of the Policy Community approach, the private sector was also included through the official representative associations of tourism enterprises, hotel owners, travel agents and sports tourism operating companies (Biddiscombe, 2004).

The GNTO has a wide range of responsibilities, reflected in its departmental structure, including the fields of research, statistics, legislative matters, investments, local governance, implementation and land use, environmental protection, technical support, advertising, education, cultural events and casinos. For the purpose of this study, it was considered appropriate to analyse the views of all those departments relevant to the formulation and implementation of developmental policies and thus, selectively excluding those parts with irrelevant responsibilities, often of a more technical nature.

Consequently, the decisions of case choices were made more on conceptual grounds, but remained representative. The issue of the generalizability of the research findings, either through conceptual power or representativeness, could perhaps be questioned by some, arguing that each case is unique. However, according to Miles and Huberman (1994), we can generalise from one case to the next on the basis of a match to the underlying theory or topic, in this case, the position of new tourism forms in stagnated mass tourism environments. Thus, the parameters of the studied issues were examined in a planned and structured fashion, but occasionally refocusing and redrawing the sampling and the questions put to some respondents.

Along with obtained interviews at a central government level, representative bodies of tourism businesses were included within the work investigating the wider community of ‘suppliers’. At the national level, the private sector was represented by the largest industry bodies based in Athens namely, the Hellenic Association of Tourism Enterprises, the Hellenic Association of Hotel Owners and the Hellenic Association of Travel Businesses. Comparable information was also collected within local association departments of the tourism industry, complementing but also cross examining the level of similarity (or diversity) between national and local sector views and ideas.

For the purposes of this study, a ‘variable’ oriented strategy was employed, in the first instance because in a variable-oriented analysis, the predictor variables are intercorrelated and the key dependent variable (in this case the development of sports tourism in Greece) is regressed on the others’ (Huberman and Miles, 1994). This type of analysis is helpful in finding probabilistic relationships amongst the variables in a population. Its reduced size decreases the difficulty found in ‘causal complexities’ and increases manageability of the data. This size also allows benefits from the application of a case-oriented analysis as well,

where a closer look into the particular cases can tease out configurations within each case and subjects them to comparative analysis (ibid.).

Results

Setting the context for policy formulation

The concept of introducing sporting ingredients into an often standard Greek sun, sea, and sand product, attracted positive reactions from the majority of central and local bodies involved in the tourism planning process. Within the study, the policy community was identified at both central and local level, including the influential private sector actors in the process. This policy community, presented clear evidence of some shared perceptions of the problematic nature of Greek tourism, and these are significant to the study overall.

From an initial analysis of both public documents and formal interviews, it appears that the monolithic tourism product in Greece based on the sun and sand ingredients, faces an inevitable shift of direction in order to maintain a viable position within the Mediterranean tourism market (Goutzioupas, 2004). At a central government level, the role of sports tourism is seen in the context of quality improvement of the offered services, aiming at the attraction of visitors of high socio-economic status.

Despite the apparent lack of a common technical language and the evident definitional confusion surrounding some new tourism components, such as special interest tourism as noted above, there was a unified view across most central and regional actors regarding the potential significance of sport tourism as a regenerating force within the tourism development process. This common ground on a new tourism philosophy demonstrates, as much as anything identified, a cooperative intention towards the start of a differentiation strategy for Greek tourism.

The study has necessarily focused on the ‘producers’ perspective, although there is clearly scope for other studies to review ‘consumers’ roles in the development of sport tourism in Greece. As the main initiator of strategic tourism development in Greece, the GNTTO has been identified as the decisive actor within the tourism policy community, having responsibilities for policy formulation and implementation. This is reinforced by the highly centralised government machinery, with the production of policy documents exclusively by the GNTTO, which dictates the direction for the Greek tourism. An example of this process is the present policy direction towards a more differentiated tourism product offer, which is being underpinned by associated developmental legislation. Policies by the public sector that promote ‘quality’ sport tourism products to attract new markets, in Greece are seen to conflict with the objectives and investment priorities of sport organisations, aimed primarily at increasing participation levels of people; the facilities for which are often wholly different. Providing predominately for its valuable foreign clientele, tourism policy clearly discriminates against local residents’ needs for sport participation and facility use.

Despite the relatively unquestioned role of the government in the administration and operation of the Greek tourism product (primarily due to the economic benefits of tourism and the partial reliance of the Greek economy on this), the direct entrepreneurial role of public tourism bodies is now undergoing revision in the face of the increasing need to reduce foreign debt, regional inequalities and to encourage greater private sector involvement in tourism, which is widely recognised as a primarily commercial activity field.

Primary evidence from this research shows that the state tourism bureaucracy is increasingly being dismantled in order to encourage commercial tourism development, support the improvement of tourism infrastructure and facilities, and in order to produce a more competitive product. To date the government has subsidised, to a significant extent, the substantial cost of the production of sport tourism-related infrastructure (marinas, golf

courses and trekking paths etc.), recognising the lack of private venture capital to initiate such developments. Interviews within this study now suggest a new assumption is being made whereby private sector investment is possible, provided that it is supported by government assistance involving particularly the provision of favourable investment conditions. The improvement of general infrastructure in the already established destinations and the provision of basic services to the under-developed tourist regions, was regarded by central government as crucial to the development of a rejuvenated tourism product offer.

However, despite increasing private sector demands for a more restricted role for government in Greece, in recent years in a number of key sectors, there has been a paradoxical demand for more public sector involvement at all levels of tourism development, particularly in the area of marketing and promotion, which have been seen to be weak and poorly targeted. The government reaction to the pressuring private tourism bodies, again evidenced in the research, is based on arguments highlighting the changing market conditions towards an increasingly free enterprise economy and a diminishing role for government within business promotion.

In contrast, industry representatives highlight the 'public good' deriving from a thriving developed destination and product offer, in order to justify their demand for heavy government involvement in tourism planning, and particularly promotion. According to key private sector representatives approached within the study, tourism is or should be, a public good shared by many involved parties, benefiting more than one section of the tourist industry and the other related local and national economic sectors. Their thinking is that the tourism industry has to be supported because it produces income both directly and indirectly, but that it is difficult to achieve a sufficient return from individual large scale construction and promotional programmes for expensive specialised sport tourism developments. An overall strategic presence is therefore viewed as necessary to ensure that individual

programmes are subsidised, in order to produce a larger, viable ‘whole’ tourism product. Funding for national and local tourism promotion presently comes from the public purse, rather than from the industry, and clearly it is in the interests of the tourism industry to maintain this situation. This continuing reliance on government funding takes on greater significance when the costs of promoting a new differentiated tourism image are substantial and clearly exceed the availability of private capital in Greece.

In terms of the future realising and operationalising of some of the identified potential for an increasing emphasis on sports tourism, to increase the differentiation and future value of the Greek tourism product, it is evident that as long as central government is self-characterised as the interest promoter and protector of tourism development, the private sector will continue to criticise the public machinery for planning inertia and particularly the operation of ‘political’ assessments and intentions. The lack of a widely agreed planning framework is seen by the private sector to mitigate against effective new developments. The defence of a variety of interests is seen by commercial operators to occupy much government activity. The relationship between the different private sector tourism operators, sports bodies, environmental agencies and local authorities clearly raises questions about the extent to which policy formulation processes lead to outcomes which are in the ‘national interest’, rather than a set of largely narrow private or public sector interests.

Alongside this highly centralised policy authority, which was clearly identified by the interviewees, the influence of EU policy directions was also evident within both policy documents and interviews, for several aspects of policy. In fact, the emphasis on sustainable developmental principles and differentiated tourism, adopted by central government policy makers demonstrates a strengthening of the EU as an agent within the policy community for tourism in Greece. The developmental criteria and financial support of the EU are decisive

within the centralised policy for tourism, which in turn is dominant (although diminishing) as an initiator and promoter of new developments for tourism in Greece.

In Greece, EU guidelines for new tourism developments have proved decisive in the new public policy direction, promoting special interest and especially sport and recreation tourism forms, but recognising the need to adhere to ‘sustainable development’ approaches. More importantly, the financial contribution of the available EU funds for the creation and improvement of both general and tourism infrastructure, along with the construction of sports-related superstructure in both established and new destinations, has been a catalytic factor in the potential for sport-tourism developments in Greece. Facilitating access through effective infrastructure (which is what most public and private sector representatives consider to be the main obstacle to development), have seen EU funding schemes becoming the initiating factor in a number of developments, despite local inexperience in designing attractive proposals.

Forming an Intra-agency Policy Consensus

The most characteristic gap within this identified policy community for the Greek tourism environment lies between the central policy-making concerns and the private tourism sector. Interviewees from several sections of the industry emphasised their perceived exclusion from the policy designation process, and this clearly leads to a commensurate reduction of valuable market information and knowledge of operational difficulties. The largely consistent view that much of the new policy and legislation exhibits an inability to attract private initiatives and support, demonstrated a lack of policy consensus on implementation mechanisms for the differentiation policy, despite the initial support and calls for new policy directions and for product differentiation. Subsidies, despite their favourable terms, have been received with hesitation by the private sector and it has been suggested that

these are insufficient to initiate large developmental changes. However, some elements within the tourism industry are clearly fuelling or enlarging this community gap in their suggestion that more significant proportions of the funding of initiatives and infrastructural support is necessary by the State, and this can be construed as either profiteering or only partial support for the concepts being advocated.

Despite the defensive stance of the central government, which claims that existing mechanisms can support new types of sport tourism development, there remains an apparent absence of an over-arching agency which involves all sports tourism developmental parameters. In addition, there is criticism evident between government departments regarding the exclusion from the policy formulation and planning process of a number of key interest groups. This suggests a narrow and anti-democratic approach to planning in Greece at present. Sports tourism development clearly needs to be encompassed within a broader range of governmental, economic, social and environmental policies. Policy decisions should reflect a will to satisfy all national and local interests, rather than focusing exclusively on the sectionally defined interests of the tourism industry.

In either case, greater involvement of private sector representatives in the policy development process would appear beneficial to the realisation of a number of proposed initiatives. At present the lack of a private tourism sector voice in the policy development process is clearly evident in the statements of the interviewees concerning the creation and communication of the new image that accompanies the tourism differentiation process. The sense that tourism businesses have no control over the designation and promotion of an alternative tourism image has created feelings of exclusion and insecurity in terms of the determination of the viability of their business. Paradoxically, there is support for effective state intervention in other contexts, appreciating the large public legislative mechanisms and

infrastructural investments necessary to rejuvenate the product that lies beneath a tourism image which is deteriorating.

Whilst the private sector may have frustrations with their lack of voice in policy making, there is some evidence of change however, with central government policy announcements now presenting a more participatory approach to the new policy direction toward differentiation, implying that responsibility for the complex character of the new style of recreational offer will be more heavily allocated to the relevant governmental and local administrative departments. However, the improvement of local and regional capabilities in the context of self-administration, faces a further series of strong criticisms from local government due to the continuation of the high level of financial dependency on the ‘distant state’, which results in an incapacity to profit materially from such decentralisation, and difficulty in its execution.

Local Representation towards a Sport Tourism Policy Scheme

The desire for more local power in mapping appropriate local strategies for tourism development, as well as other concerns, was evident in the interviews with local government representatives, who believe strongly in the importance of their potential in creating and promoting a distinct local tourism product. It is notable that sports tourism features as a high priority amongst local planning strategies, as having the ability to promote distinct local physical and cultural characteristics. Local self-administration capable of utilising the knowledge of local advantages and the potential of specific sport tourism products was strongly advocated by public actors (Vrondou and Kriemadis, 2008). Private sector developers, however, preferred adherence to a more centralised approach of decision making and planning, invariably because of the perceived greater potential for public sector investment and thus industry support that this implies. Paradoxically, a demand for effective

State intervention in mapping and operationalising a product differentiation strategy is shared by a large number of bureaucrats, admitting often to a local inability to implement developments and ultimately to create the distinctive sport-related image desired. The establishment of Prefectural Tourism Promotion Committees is argued by the central government to allow the types of community involvement, transparency and democratic approaches in the context of regional planning and social sustainability, promoted by recent European as well as national policy reforms.

Tourism development in the regions, especially for under-developed areas, is subject to the ability of the political and administrative structure to be readjusted so as to favour regional growth and local prosperity. The sustainability paradigm suggests that the planning for this regional tourism development must take place within the regions themselves, and the will to do this was evident during the research. However, to produce a distinct sport tourism product offer and to enhance external awareness of this, without conflicting with the interests of private sector operators, is a problematic feature of such developments. A very genuine local sports tourism product seems often to be influenced exclusively by external international commercial interests, adopting a control approach to product development and promotion to the market. All interviewed parties seem to agree on the existing disproportionately high level of control exercised by foreign operators over present and future developments, and the negative local impacts of this. The struggle between the desire to minimise outside control and reduce dependency on the one hand, and on the other to maintain the value of existing tourism investment, has increasingly led to the inclusion of recreational ingredients such as sport activities within the tourism offer. A strong desire for the State to utilise regulatory mechanisms was clearly evidenced in the study, particularly with a view to limiting the power of external commercial operations, by both the local public

administration and the local industry, with the aim being to produce a strong and inelastic product within an increasingly competitive market.

The central government tends to be highly supportive of large scale recreational facilities, particularly through favourable funding schemes for costly sport tourism infrastructure, such as marinas and golf courses, particularly (as here) where they are identified with quality tourism. While still supportive of sports-oriented tourism developments, some other sources identify some problems in this process. For example, in several locations there are a number of concerns regarding the scale and commensurate impact of some of these proposed developments on local tourism. Also, despite the commonly agreed policy direction towards quality and product differentiation, involving inter alia sports-related tourism development, there is less common ground, particularly between private businesses and local government sources, on the overall costs of such development and who pays the more substantial amounts for some necessary elements of these projects, e.g. market analysis, infrastructure costs, central capital development, broader marketing etc.

Conclusions and Implications

Semi-structured in-depth interviews with key officials, within a carefully designed framework, offered valuable insight into developmental procedures and organisational cultures which, along with a similar sampling of key private sector actors, provided a viable representation of the tourism policy community in Greece.

Within this strongly centralised policy community, there are some changes beginning to emerge, with tourism policy makers suggesting the need for fundamental infrastructural and legislative changes before redirecting the tourism product offer towards new products, such as sport tourism. In addition, some policy implementers appear very skeptical regarding the willingness of private sector tourism interests to adopt new differentiated tourism forms,

which to them imply raised costs and relatively few substantial benefits in the short term.

The latter has far less interest at present in the longer term aspects of the sustainable development elements of current policy thinking. This separation of views is now evident between some policy makers and the implementers. The views of the latter come as a result of their role as communicators and implementers of legislative and regulatory tools for the tourism industry in Greece, and therefore their direct involvement in practice. This sub-community took a more realistic and operationalising stance towards some new developments which were evident amongst top policy makers, reflecting more substantially the private sector skepticism of some central policy making.

However, despite the need to reinvest in tourism products, which analysts would see as necessary for a destination to enter a 'rejuvenation' stage, evident is a wide diversity of perceptions regarding the identifiable added value of the sport-related tourism products, inconsistency in the willingness to undertake increased costs in order to achieve these ends on a sustainable basis, and differential ability to promote effective intra-agency communication and inter-agency co-operation (Weed & Bull, 2003). These issues can be seen to jeopardise the realisation of such desirable tourism re-investment. In addition, the shift of policy direction, the accumulation of measures, inconsistencies in legislative proposals, and the incomplete decentralisation process, all appear to increase the risk of delaying responses to development opportunities and de-railing the transition to the rejuvenation of the destination through investment in sports-oriented facilities and sports-related tourism.

By introducing a system of investment initiatives and direct funding, the GNTO is seeking to catalyse the establishment and upgrading of facilities. Improvement of tourist facility standards through investment in ancillary sport facilities almost automatically results in higher capital spending, resulting in higher pricing and inclining the product towards higher spending markets. It became evident from the research that this supply-led

developmental approach favours more the new specialised sports tourism establishments than older existing facilities. Despite the fact that the State recognised that the differentiation process could be influenced to some extent by the improvement of existing tourism superstructure, it became obvious from the interviews that new specialised and often large scale infrastructure (e.g. marinas, golf courses) and associated establishments, are the most crucial element to an alteration of the nature and profile of the Greek tourism product. Public bodies appeared generally positive to the state's intervention in supply mechanisms to change the product markedly.

This view was not, however, shared by the private tourism businesses, who generally favoured a more 'demand'-led approach to development, future growth and differentiation. Invariably, the representatives of the tourism industry emphasised that the decision to upgrade the tourism product, through the addition or upgrading of large scale sport tourism facilities and infrastructure, should be well justified initially from a marketing standpoint i.e. with revealed demand already evident. From the private sector there was less strategic vision regarding improving the long term profitability of the Greek tourism product and greater emphasis on more immediate financial returns. While this is perhaps unsurprising, the lack of response to the State vision, and lack of strategic vision, is disappointing. From the private sector viewpoint, investment and financial incentives will undoubtedly improve the product, increase the price, and alter the image, but to many operators there appears to be insufficient market demand to make the new product marketing feasible.

This view has evidently been reinforced by the inability of public mechanisms to examine and estimate potential demand levels for sport tourism in Greece, alongside the industry's inertia in exploiting the fragmented expressions of demand at present. Interviewees from all sections of the industry repeatedly emphasised that the successful development of sport tourism would have to be based largely on high levels of expressed

demand and not sporadic expressions of interest for certain recreational activities. This is clearly ultimately a self-defeating situation and exhibits both lack of vision and lack of strategic direction from the industry. Demand will not increase until facilities evolve, and these will not evolve unless the industry sees demand. Two further weaknesses of the Greek tourism industry are identified here: firstly, a lack of recognition of the potential to exploit changing tourism tastes exhibited in main foreign markets for an improvement in the long term profitability of the sector; and secondly, an acceptance of dependency and that foreign tour operators largely control the nature and volume of tourism in Greece. It is this apparent lack of vision from the industry that reinforces the limited optimism that the private sector tourism interests largely have in the potential of the sports tourism sector to enhance the Greek tourism product.

The attempts of public administration to change the product's nature is conceived by the private sector as narrowing the market and ignoring significant short term marketing opportunities. The private sector prefers a diversified and improved product with its ability to satisfy a variety of markets and widen entrepreneurial opportunities. Public sector attempts to catalyse tourism growth through what seems to the industry to be a specific sport tourism infrastructure, in order to differentiate the present stagnating product, has agitated the industry's sensitivity to proven demand levels and it is this disharmony in the vision of the short term profitability and longer term development potential, which is currently limiting the potential for successful sports tourism product development in Greece.

The way through this problem, appears to be a much-tried method. Offering successful models of development has always been a driving force for business initiatives, leading to beneficial development particularly in tourism. This has a reasonably long history in Greece, with public tourism bodies appreciating the above type of private sector arguments and justifying their decisions by establishing 'integrated areas of tourism development', that

can demonstrate the importance and benefits of producing new distinctive and competitive products (Vrondou & Kriemadis, 2007). This public model of experimental development has, however, given rise to an emerging conflict between different sides of public and private thinking, particularly concerning the direction of developments towards existing or under-developed destinations.

The present study highlights the limited level of collaboration between the administrative bodies of the two sectors of sport and tourism which results from a conscious preservation of the status quo within their separate spheres of influence. In contrast to some authors' optimism that there appear very few reasons why collaboration between the two sectors should not develop, in Greece as elsewhere (Jackson and Morphet, 1999; Collins and Jackson, 1998) the fields of sport and tourism (manifest by their separate agencies) are consciously following different policy goals. Converse to the advocated democratic approaches to local involvement, identified in, for example Inskeep's (1994) work on community participation to tourism planning, national public policies in Greece focus almost exclusively on sporting ingredients for their capacity to regenerate stagnated tourism products, and are, for the most part, centrally driven, rather than enhancing local sporting opportunities and local involvement in tourism planning. While the two approaches are not mutually exclusive, the existing focus is creating tensions leading to implementation barriers.

The present study, apart from being used to provide an in-depth insight into the arena for tourism policy and product change in Greece, can assist in enabling generalisations to be made regarding the potential for sports-oriented special interest tourism to similar settings. What is evident is that in the process of establishing a differentiated sport tourism product offer and image for both existing and new tourism destinations, strategic planning is taking on greater significance. Establishing a new special tourism product like sport tourism is an example of a process where the extension of areas for consideration, as well as the

transformation of the present administrative and operational systems to satisfy the needs of a broader social and developmental spectrum, sits uncomfortably with traditional and well-ingrained Greek policy systems.

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