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Snow Magic

An analysis of the status and potentials of
specific branches of tourism
in Mývatn District

Summary report

Submitted to:
The Development Agency of Thingeyjarsýsla Region



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1.0 About the project

The following chapter includes an introduction of the background and focus of the *Snow Magic* project. The working methods that were chosen for the analysis component of the Icelandic part of the project will furthermore be introduced.

1.1 Background and project focus

Snow Magic is the name of a development project with partners from three countries, i.e. Sweden, Finland and Iceland. The project idea was formed through the design of a funding application to the *Northern Periphery Programme* (NPP). NPP's aim is to facilitate joint projects among partners from the most Northern regions of Europe. The *Snow Magic* project includes joint initiatives of all project partners as well as geographically-focused projects in each of the participating countries. The project main goal is the following¹:

"Snow Magic aims at designing and promoting attractive products, services and events in northern Europe based on the sustainable use of snow and ice combined with local resources, tales and legends and new technologies. The overall aim is to support both tourist activities and local society."

The Development Agency of Thingeyjarsýsla Region (Atþing) is in charge of implementing the Icelandic part of the project. The geographical focus of the Icelandic part is on Mývatn District and Atþing works closely with local stakeholders in the district. The overall goal of the Icelandic part of the project is to strengthen economic activities in Mývatn District, especially in the winter season, with an emphasis on tourism development.

Based on *Snow Magic's* main goal (see above) three specific branches of tourism were selected as areas of emphasis for the Icelandic part of the project. These are:

1. Recreation-based tourism that has close connections with the district's natural winter conditions, such as snow and ice.
2. Health-based tourism that has close connections with outdoor activities and the utilization of geothermal resources in the district.
3. Culture-based tourism that has close connections with the history, heritage and culinary traditions of the district.

One component of the Icelandic part of the project consisted of an analysis of Mývatn District's status and potentials from the perspective of the three chosen tourism branches. For this aspect of the project Atþing joined forces with the University of Akureyri Research Institute (RHA). RHA led the analysis in close cooperation with the project administrators at Atþing and local stakeholders from the district.

¹ For more details see the web site of the *Snow Magic* project at <http://www.snowmagic.nu>.

1.2 Methods used for the analysis component: Porter's diamond

The methodology used for the analysis component of the Icelandic part of the *Snow Magic* project is built on Porter's model of determinants and dynamics of regional advantage, which also is commonly referred to as Porter's diamond². This model can be used as a tool for analyzing the competitive status of an industry sector (or a sector branch) in a selected locality; in this case the competitive status of the three chosen branches of the tourism industry in Mývatn District.

Porter's methodology builds on an organized evaluation of four key determinants, which are looked at as a system where the determinants affect (reinforce/undermine) each other. The four determinants are the following:

1. **Factor conditions:** The locality's position in factors necessary to compete in a given industry (branch). In this case these include for example labor (quantity and skills), location/geographical factors and natural resources that can contribute to the district's attractiveness to tourists, infrastructure (transportation, service systems), and capital.
2. **Demand conditions:** The nature of demand for the sector's (branch's) product/services. In this case these include for example the status of demand, composition of the current demand/market, and recent trends and development in the market.
3. **Related and supporting industries:** Related industries are those where firms can share activities in the value chain across industries or transfer skills from one industry to another. In this case the presence or absence in the locality of suppliers industries and related industries that are competitive is evaluated.
4. **Firm strategy, structure, and rivalry:** The last part of the analysis looks at how companies within the chosen industry (branches) are created, organized, managed, as well as the nature of rivalry/cooperation within the locality.

Based on Porter's model, an analysis of the competitive status of the three chosen tourism branches in Mývatn District was made, resulting in separate results for each of the branches. The model adjustment and the overall process of the analysis will be described further in the section below.

1.3 The analysis process: Participation of local stakeholders

A strong emphasis was put on involving local stakeholders in the analysis process. This approach was based on the assumption that the results of the analysis should be strongly influenced by the views, knowledge and experiences of people closely connected to the tourism industry in the district. The analysis was carried out through the following process:

I) First focus group meeting, 5th of April 2005, held in Mývatn District: A meeting of representatives of RHA, local stakeholders, and representatives of Atþing. The methodology that had been chosen for the analysis (Porter's

² The model was designed by Michael E. Porter, who first introduced it in his book *The Competitive Advantage of Nations* which was published in 1990.

diamond) was introduced. The issue of which questions should be asked for each of the four key determinants of Porter's models in the case of the three chosen tourism branches was discussed. This meeting was, in this sense, used as an arena for adjusting the model to the particular focus that had been chosen for the study, as well as to the local circumstances. The result of the meeting was a list of questions for each of the model's four key determinants (see Appendix 1).

II) Second focus group meeting, 19th of April 2005, held in Mývatn District: A meeting of the same people as before, where the questions that had been formed in the first meeting were discussed. The people attending raised their opinions and answers to each of the question, based on their own individual preparation that took place between the two meetings. During this process a consensus was reached for a majority of the questions. RHA's representatives collected the views and comments that were produced at the meeting for the purpose of creating a summation of the results from the process.

III) Summation: An Excel model was designed on the basis of the four key determinants. The questions that had been created and discussed during the two meetings were categorized under themes and those themes placed as sub themes under the four determinants in the model. By reviewing the results from the two meetings, in addition to various other secondary references, preliminary results were reached by RHA's representatives. These results were produced by labeling each of the questions included in the model as having either a positive (+) or negative (-) answer; In other words, having either a positive or negative impact on the competitive status of each of the chosen branches of tourism. Based on counting the positive and negative answers, the model calculates a grade on the scale from zero to ten for each of the four determinants. A grade ten can only be reached if all questions for a particular determinant are labeled as resulting in a positive answer rather than a negative one. The sub themes of each determinant have an equal weight in the grade of that particular determinant. However, if a majority of the questions for a sub theme is negative, or the number of positive and the number of negative answers is equal, that particular sub theme does not contribute to the overall grade of the determinant. This means that neither the result for each sub theme, nor the overall grade for each determinant can become a negative number.

The preliminary results of the model were sent to each of the participants in the two focus group meetings for a review. All participants in the analysis process were in that way given the opportunity to comment on the preliminary results before the results were finalized in a project report.

The results of the analysis are presented in a table format in Appendix 1 of this report. A summation of the results for each of the chosen branches is further more displayed in a graphic format in chapter 3.0 of this report.

2.0 Mývatn District: Community profile

Below are some key facts on Mývatn District.

2.1 Location

Skútustaðahreppur Municipality, also commonly referred to as Mývatn District³ after Lake Mývatn, the district's greatest landmark, fills up the South East corner of the Northeast Region (see figure 1). The driving distance from Mývatn District to Akureyri, which is the largest urban center of the Northeast Region, is around 100 km.

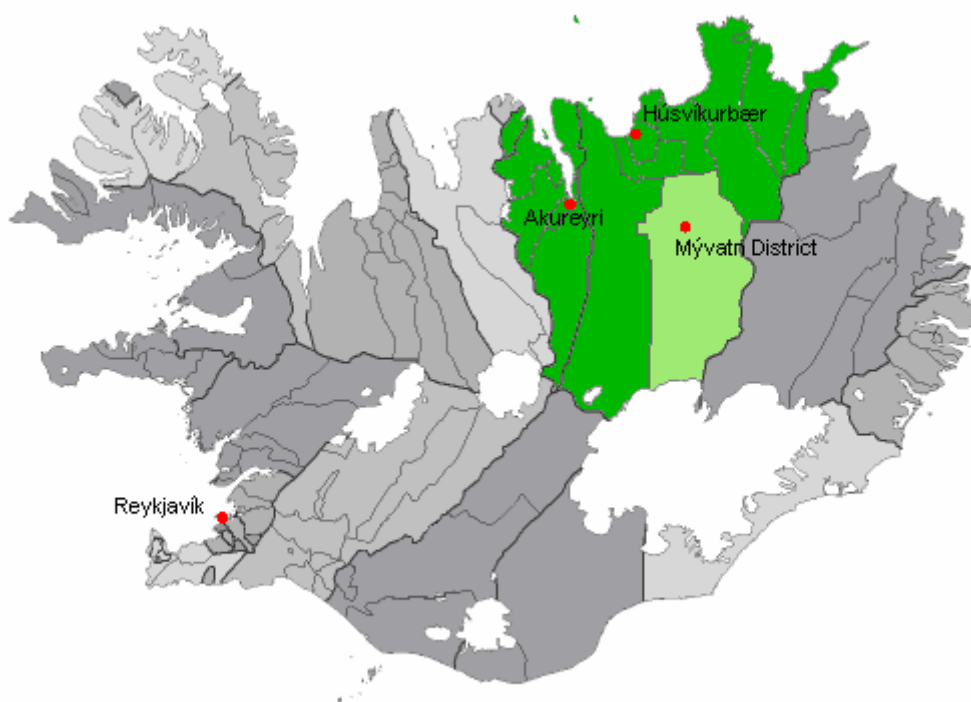


Figure 1: A map of Iceland that shows the location of the Northeast Region (dark green) and location of Mývatn District (light green).

2.2 Population

According to official population counts⁴, the district has 437 inhabitants (based on December 2004 data). Approximately 200 people live in the village Reykjahlíð, but the rest live in sparsely distributed habitats such as farms and other private residences. In the period from 1984 to 2004 the population of the district declined by 26%⁵.

³ In Icelandic: Mývatnssveit.

⁴ Statistics Iceland. 2005. Data available on SI's web site at <http://www.hagstofa.is>.

⁵ Statistics Iceland. 2005. Data available on SI's web site at <http://www.hagstofa.is>.

2.3 Economic base

In earlier days, people living in Mývatn District made their living mostly from agriculture and trout fishing. In recent years, however, the scenario has changed considerably. A diatomite factory (Kísiliðjan) was established in the late sixties and was the largest employer in the district until at the end of 2004, when the factory was closed down. Another large employer is a governmentally run geothermal power plant (Kröfluvirkjun) with around 20 employees and the municipality (local government offices and organizations) with around 30 employees. Tourism is also a very important industry, although a majority of jobs in the tourism industry are seasonal, i.e. only available during the summer months.

2.4 The labor market situation

No official statistics are available on the number of labor force in Mývatn District. However, by using a rough estimation, 50% of the population can be expected to belong to the labor force. By using such a rule of thumb, 219 people belonged to the district's labor force in the year 2004. The Icelandic Directorate of Labor collects statistics at a municipal level on the number of people registered unemployed at the end of each month. In the period from September 2004 to April 2005, 16 people were registered unemployed on average per month. This translated into an average monthly employment rate of 7.3%⁶. This is a considerably higher rate than in the years before. The increase in unemployment is a result of the closure of the before-mentioned diatomite factory, which occurred at the end of November 2004. There are considerable seasonal differences in the unemployment rate in Mývatn District. This is primarily caused by seasonal swings in the tourism industry which is the community's largest source of jobs during the summer months.

2.5 Public administration and infrastructure

Mývatn District has a municipal status. The local government is in charge of various public services that Icelandic municipalities are required by law to provide its inhabitants with. These for example include educational services from children six to 16 years old, day care services, and various social services. In the past the municipality has participated in some development initiatives associated with the tourism industry. Currently the financial affairs of the municipality do, however, not allow for new investments, unless the operation and priorities of the municipality will go through considerable restructuring.

Most basic general services (e.g. a bank, a post office, a grocery store and some basic health care services) are accessible in Mývatn District. However, in most cases these services have fairly limited opening hours in the winter time. This especially applies to the healthcare services.

⁶ The Icelandic Directorate of Labor. 2005. Series of reports available on the Directorate's web site at <http://www.vinnumalastofnun.is>.

According to a recent study⁷ the range of resident housing options in the district is quite limited. Especially there seems to be a lack of rental housing as well as appropriate housing for the elderly. The municipality has very limited access to land, since all land within the municipality is privately own. This situation makes planning and development of residential as well as industrial building sites complicated.

Road connections to Mývatn District can be regarded as sufficient. Highway no. 1 crosses the district and roads are generally in good conditions. In terms of air links the picture is somewhat different. The closest domestic airport where regular flights pass through is in Akureyri, which is in around 100 km. distance from the district. The only international airport in Iceland is however, located in the Capital Region, which is in around 6 hours driving distance from Mývatn District.

3.0 Summary of key result of the analysis

Below is a basic summary of the overall results of the analysis. The results include an outcome for the four key determinants of Porter's diamond and are represented both in a graphic format as well as in the form of grades on the scale from zero to ten. Results are displayed separately for each of the chosen branches. A more detailed representation of the results can be found in Appendix 1 in a table format. A detailed discussion and arguments supporting the analysis results is, furthermore, provided in the main project report⁸.

3.1 Recreation-based tourism

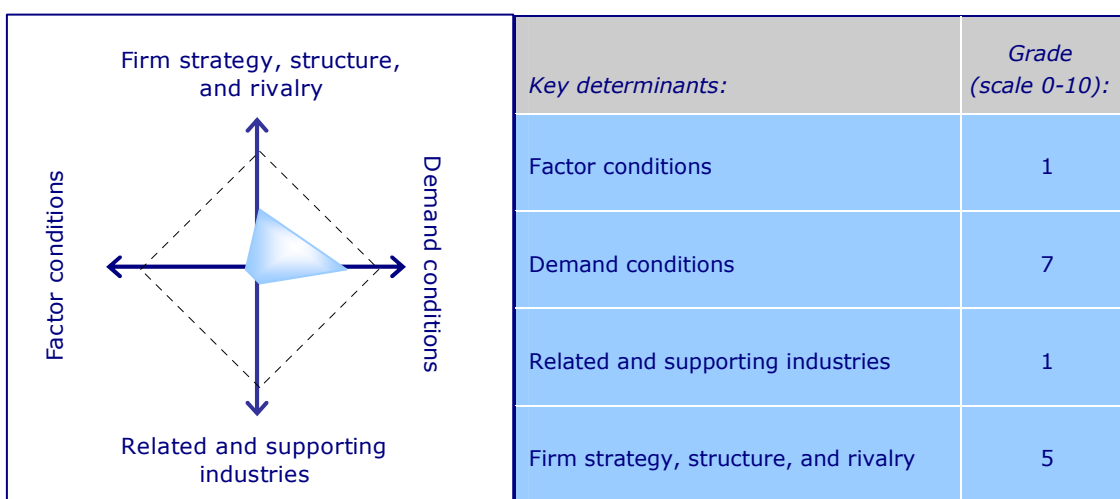


Figure 2: Summary of results for recreation-based tourism that has close connections with the district's natural winter conditions, such as snow and ice.

⁷ Atvinnu- og húsnaðismál í Skútustaðahreppi. 2004. Akureyri, RHA.

⁸ The main project report is only available in Icelandic. For further information contact The Development Agency of Thingeyjarsýsla Region (gunnar@atthing.is).

3.2 Health-based tourism

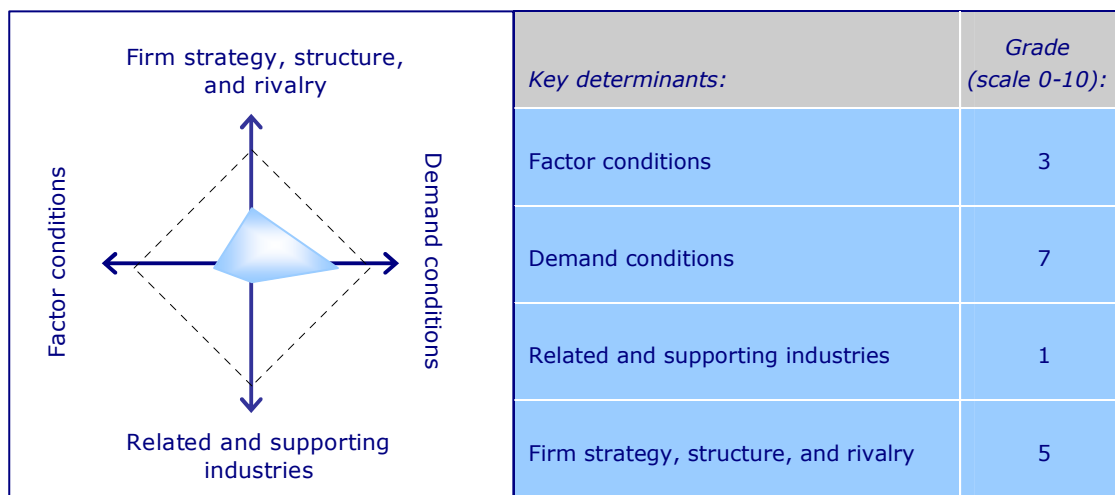


Figure 3: Summary of results for health-based tourism that has close connections with outdoor activities and the utilization of geothermal resources in the district.

3.3 Culture-based tourism

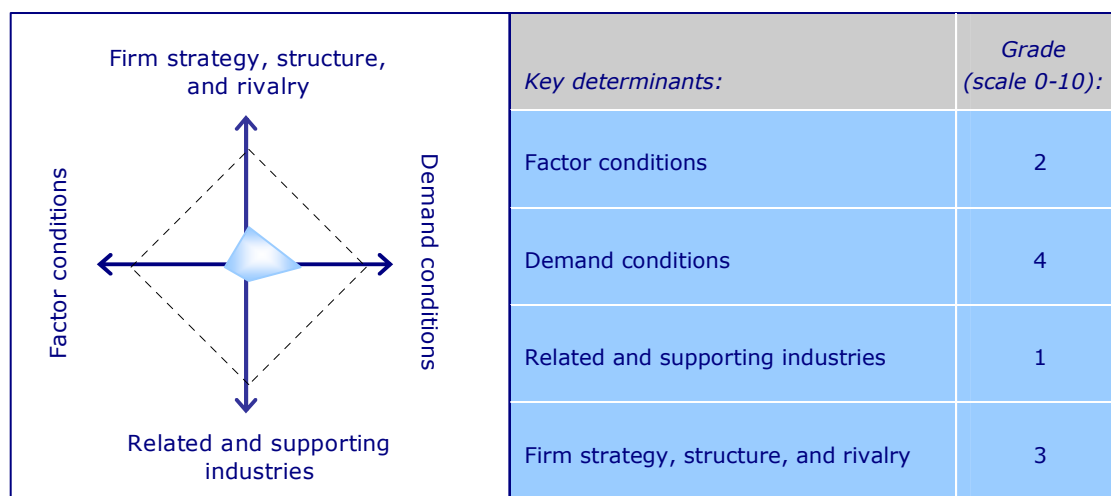


Figure 4: Summary of results for culture-based tourism that has close connections with the history, heritage and culinary traditions of the district.

4.0 Strengths for future development within the selected branches of tourism

The results of the analysis that have been presented in this report should help us answer the following question:

What are the strongest elements of the competitiveness of the selected branches of tourism in Mývatn District?

Based on the results of the analysis the authors of this report would like to highlight the following strengths, which at the same time can be regarded to encompass opportunities for strengthening of those branches of tourism that were selected as areas of emphasis for the Icelandic part of the *Snow Magic* project:

- **Strong market position:** One of the strongest aspects of the competitiveness of the three branches of tourism is a favorable status in regard to demand conditions in general. Mývatn District is a well known tourism destination. Operations within the three branches, which are in most cases a fairly recent addition to the tourism services in the district, are likely to benefit from decades of marketing efforts of the area in general, as well as from some long-standing business connections and the extensive experience of local people in the field of tourism. These overall conditions encompass opportunities for further development of all tourism activities in the district whole year around.
- **Willingness to grow:** Representatives of operations within the three chosen branches generally indicate a strong will to expand their operations. The district, furthermore, already possess some pioneers within the chosen branches. This especially applies for recreation-based tourism services that are either health-related or linked to the district's natural winter conditions. The positive attitude, entrepreneurial spirit and the ambitious vision of these pioneers, are factors that are likely to increase the chance of success on a international market that is characterized by a tough competition.
- **Strong attraction of the natural environment:** Although the analysis did produce some unfavorable results in regard to the basic factor conditions, the analysis also produced some positive results in this respect. The strong attraction of the natural environment of the district can be regarded likely to support further development within the three chosen branches. In most cases the tourist's experience of the environment can not easily be detached from the experience of the actual services, since the environment in many cases forms the "package" for the actual tourism product.
- **Easy access to knowledge:** The results of the analysis show that new knowledge, relevant to tourism development, as well as educational- and consulting services are fairly accessible in Mývatn District. It can be argued that this easy access can create opportunities for strengthening of the local labor force. An easy access to knowledge can also contribute to the development of the general knowledge and competence base that the chosen branches of tourism need for further growth. Representatives of the businesses, which currently are operated within the branches in question, as

well as representatives of the official support system of the industry, have a role in identifying what type of knowledge and competences are the ones most lacking in the district.

- **Underutilized capacity of supporting industries:** The supporting industries that are needed for the chosen branches are, for the most part, in place in Mývatn District. Accommodation services as well as restaurant- and food services are generally underutilized during the winter season and could, therefore, manage a considerable business increase. These circumstances should support development within the chosen branches as well as facilitate cooperation between firms within the branches in question and firms within the supporting industries.

5.0 Weaknesses for future development within the selected branches of tourism

The results of the analysis should also help us answer the following question:

What are the weakest elements of the competitiveness of the selected branches of tourism in Mývatn District?

Based on the results of the analysis the authors of this report would like to highlight the following weaknesses, which at the same time can be regarded to hinder further development and limit the number of opportunities for those branches of tourism that were selected as areas of emphasis:

- **Insufficient transportation links to foreign markets:** One of the most serious weaknesses of the competitiveness of Mývatn District, in regard to future development of winter tourism, is the shortage of air links connecting the area with the outside world. The most serious aspect of this shortage is the insufficient links to foreign markets. It is of uttermost importance for future development of tourism in Mývatn District that scheduled flights that connect the area with foreign markets will be arranged from an airport in as close proximity to the district as possible. The current circumstances are a considerable hindrance for the strengthening of the three chosen branches. It is, therefore, important that representatives of the tourism industry in Mývatn District, as well as other local stakeholders, join forces with representatives from the neighboring communities for the purpose of making the necessary improvements happen.
- **Weak status of the municipality and of the local labor market:** The results of the analysis show that many of the basic factor conditions in Mývatn District are quite weak. Lack of diverse housing options for example weakens the attractions of the local labor market for temporary workers as well as for permanent new-comers. The limited capacity of the municipality to provide funds for the strengthening of general services and for direct support for the tourism industry can also be regarded a weakness of the competitiveness of the district in regard to future development of the tourism industry. The status of ownership of land within the district also creates some restrictions for the municipality when it comes to planning of new initiatives and projects. It seems evident that the local government has to use every means to make

the most of its income, put a stronger emphasis on prioritizing the different tasks and expenditures, as well as implementing a clearer policy in regard to areas of emphasis for economic development within the district.

- **Weak cooperation morale:** Through discussions between the authors of this report and representatives of different tourism firms in Mývatn District, it was quite evident that the cooperation morale between the different firms and stakeholders, within the district, is fairly weak. Fragile cooperation morale, appearing as a limited interest in cooperation and an expression of negative experiences from cooperation activities, is a serious limitation to the competitiveness of the tourism industry within the district. A local tourism association is in place within the district. This association is, however, quite inactive. The association would be an ideal arena for new cooperation initiatives. For the purpose of activating the association, representatives of local tourism business have a role, but also representatives of various organizations that work for the common good of the industry and/or the community as a whole. Examples of such organizations include Skútustaðahreppur Municipality and the Development Agency of Thingeyjarsýsla Region. These organizations can support the local tourism association in a variety of ways, e.g. through financing and work contributions, as well as by demonstrating good will and encouragement.
- **Tough financing situation:** The limited availability of start-up funding (especially in the form of equity) for new businesses and initiatives in the chosen branches, is a serious barrier for future development of the branches. Tourism businesses that focus on recreational services, also commonly have difficulties in providing the collaterals necessary for ensuring access to loans. Representatives of tourism firms in Mývatn district need to join forces with other tourism stakeholder groups, from the rural regions of Iceland, with the aim of reaching the attention of public authorities and governmental funding agencies. Representatives of tourism firms in Mývatn District also have a role as contributors to the creation of a positive image for the rural tourism industry as a whole. Such an image can be supported by a business reputation that reflects well-run businesses that have the capacity to compete on the international tourism market, and therefore can be regarded as attractive investment options.

Appendix 1

1) Factor conditions:	Recreation-based tourism (linked to natural winter conditions) (+/-)	Culture-based tourism (history, heritage and culinary traditions) (+/-)	Health-based tourism (outdoor activities and utilization of geothermal resources) (+/-)
Environmental attraction and natural resources	0,25	0,75	0,75
Does the district's natural environment create attraction for tourists?	+	+	+
Can the district's natural environment be directly used in operations of this kind?	+	+	+
Is the geographical position of the district favorable or unfavorable in regard to relevant markets?	-	-	-
Is an operation of this sort dependent on seasonal characteristics?	-	+	+
Do typical weather conditions influence the attraction of the district in a negative or a positive way?	+	+	+
Labor force	0,00	0,00	0
Is sufficient labor force available in the district during the winter time?	+	+	+
Does the available labor force possess the relevant knowledge and skills?	-	-	-
Is there sufficient housing available in the district for temporary (or new permanent additions) to the labor force?	-	-	-
Access to funding/capital	0	0	0
Does the initiation and or strengthening of operations of this sort call for extensive investment of funds (is it capital intensive)?	-	-	-
Is the access to start-up funding (equity, loans) acceptable?	-	-	-
Are there any development grants available for this sort of operations?	+	+	+
Does the structure of operations of this kind generally provide collaterals that can be use to secure financing?	-	- og +	- og +
Does the district's geographical location have a negative or a positive impact on access to funding/capital?	-	-	-
Knowledge and research	0,63	0,63	1,25
Is the necessary knowledge and competences easily maintained?	+	+	+
Is the access to management consulting services sufficient?	+	+	+
Is the access to marketing consulting services sufficient?	+	+	+
Is the access to marketing information sufficient?	-	-	+
Transportation links	0	0	0
Does the road system within the district match the needs of tourists?	+	+	+
Are the road links to other regions of the country satisfactory?	+	+	+
Are the air links to other regions of the country satisfactory?	-	-	-
Are transportation links to other countries satisfactory?	-	-	-
Infrastructure and general living conditions	0	0	0
Do general standards of municipal services create satisfactory living conditions?	+	+	+
Is there sufficient range of housing options available?	-	-	-

Are the health care services, which are available in the community, satisfactory	-	-	-
Are roads kept clear enough from snow during the wintertime?	-	-	-
The role of the municipality	0	0,42	0,42
Has the municipality initiated a master plan for land-use?	+	+	+
Has the municipality contributed to the development of operations of this sort (through goodwill or direct financial involvement)?	-	+	+
Does the municipality have the financial capacity to contribute to further tourism development within its borders?	-	-	-
Restrictions	0,25	0,25	0,75
Do laws or regulations regarding safety standards create restrictions for operations of this sort?	+	+	+
Do laws or regulations regarding nature conservation create restrictions for operations of this sort?	-	+	+
Do laws or regulations regarding industry (branch)-specific issues create restrictions for operations of this sort?	+	-	+
Do laws or regulations regarding quality standards or general operation licenses create restrictions for operations of this sort?	+	+	+
Does ownership of land create restrictions for operations of this sort?	-	-	-

2) Demand conditions:	Recreation-based tourism (linked to natural winter conditions) (+/-)	Culture-based tourism (history, heritage and culinary traditions) (+/-)	Health-based tourism (outdoor activities and utilization of geothermal resources) (+/-)
Nature	3,33	1,11	3,33
Do operations of this kind appeal to a broad market (target group)?	+	-	+
Is there currently a demand for services of this sort?	+	+	+
Is the demand for services of operations of this sort likely to fluctuate?	+	+	+
Development	3,33	3,33	3,33
Are there currently any evident trends, on the domestic market, that are likely to create opportunities for strengthening of the industry (branch)?	+	+	+
Are there currently any evident trends, on the international market, that are likely to create opportunities for strengthening of the industry (branch)?	+	+	+
Is the demand growing or decreasing?	+	+	+
Market access	0,67	0,00	0,67
Have any marketing efforts already been carried out for this specific branch of tourism in the district?	+	-	+
Does this specific branch of tourism benefit from official marketing efforts of the Icelandic government?	-	-	-
Is access to the domestic market in any way restricted?	+	+	+
Is access to the international market in any way restricted?	-	-	-
Does this branch of tourism fit well to the marketing focus of dominating firms on the Icelandic tourism market?	+	-	+

3) Related and supporting industries	Recreation-based tourism (linked to natural winter conditions) (+/-)	Culture-based tourism (history, heritage and culinary traditions) (+/-)	Health-based tourism (outdoor activities and utilization of geothermal resources) (+/-)
Existence	1,11	1,11	1,11
Are restaurants and other food services available in the district?	+	+	+
Are accommodation services available in the district?	+	+	+
Are group tour services (coaches) available in the district?	+	+	+
Are car rental services available in the district?	-	-	-
Are the necessary specialized services available in the district?	-	-	-
Are general services (bank, post office, etc.) available in the district?	+	+	+
Competitiveness/standard (on the domestic market)	0,00	0,00	0,00
Is the competitive status of restaurants and other food services satisfactory?	+	+	+
Is the competitive status of accommodation services satisfactory?	+	+	+
Is the competitive status of group tour services (coaches) satisfactory?	-	-	-
Is the competitive status of general services (bank, post office, etc.) satisfactory?	-	-	-
Variety	0,00	0,00	0,00
Do restaurants and other food services in the district fulfill the needs of a broad range of client groups?	-	-	-
Do accommodation services in the district fulfill the needs of a broad range of client groups?	+	+	+
Do group tour services (coaches) in the district fulfill the needs of a broad range of client groups?	+	+	+
Do general services (bank, post office, etc.) in the district fulfill the needs of a broad range of client groups?	-	-	-

4) Firm strategy, structure, and rivalry	Recreation-based tourism (linked to natural winter conditions) (+/-)	Culture-based tourism (history, heritage and culinary traditions) (+/-)	Health-based tourism (outdoor activities and utilization of geothermal resources) (+/-)
Structure	1,67	0,00	1,67
Do operations within this branch already exist in the district?	+	+	+
Are existing operations (activities) within this branch the main operation of the businesses in question or are do they play a secondary role?	-	-	+
Are those operations (activities) that currently exist within this branch in the district of a diverse nature?	+	-	-
Are the operations within this branch, which currently exist in the district, locally owned/controlled?	+	+	+
Development and direction	3,33	3,33	3,33
Are current operations within this branch willing to expand??	+	+	+
Has this branch of tourism been expanding or declining in the district in recent years?	+	+	+
Is the competitiveness of the operations within this branch in the district equal to comparable operations on the domestic market?	+	+	+
Do the operations within this branch that currently exist in the district have a clear strategy/mandate?	+	+	+
Cooperation and competition	0,00	0,00	0,00
Do firms within this branch of tourism in the district cooperate?	<i>There are too few business existing, so this can be evaluated</i>		
Do firms within this branch of tourism in the district compete with each other?	<i>There are too few business existing, so this can be evaluated</i>		
Do firms within this branch of tourism in the district cooperate with other tourism business that are located outside the district?	-	+	-
Do tourism firms within the district have access to an active arena (association, network, etc.) for local cooperation, which is open to all interested firms?	-	-	-
Is the cooperation morale among tourism firms with in the district hindering or facilitating cooperation?	-	-	-