



# Research on Tourism Industry Policy Orientation Based on International Tourism Development Evaluation Standards: Taking the Text of Tourism Policies in Jiangsu, China 2020-2023 as an Example

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**Abstract.** This paper provides a rooted theoretical analysis of 36 tourism policies issued by Jiangsu Province, China, during the period 2020-2023, examining the strength of Jiangsu's tourism policies, the areas of policies, and the types of policies. The paper compares and analyzes the tourism policies of a region against the framework of international tourism development evaluation indicators released by the World Economic Forum, and comparatively analyzes the guiding effect of tourism policies on the recovery of the tourism industry in the aftermath of the epidemic. The conclusion of this paper emphasizes that the guiding role of tourism policy depends on the choice of policy tools, while insufficient policy strength and irrational policy structure will impede the realization of policy effects, and that this finding is instructive for the supportive policies of tourism in the post-epidemic era as well as for sustainable tourism policies.

**Keywords:** international tourism; evaluation criteria; tourism industry policy; policy orientation

## 1 INTRODUCTION

Due to the impact of the COVID-19 pandemic, the international tourism industry suffered a comprehensive blow, and the pandemic also changed the direction of development for the international tourism industry. The recovery and sustainable development of the tourism industry became the theme of the post-pandemic era for international tourism development. In May 2022, the World Economic Forum released the first tourism industry report after the pandemic, "Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future", which provided evaluation criteria and an action guide for the recovery of the international tourism industry from the pandemic<sup>10</sup>.

A review of the journals shows that many scholars are keen to study tourism industry policies, elaborating on the role of tourism policies in promoting tourism development<sup>3</sup>. It can be seen from the evolution of China's tourism policies that tourism policies play

a significant role in achieving economic development strategic goals at different stages of economic development<sup>8</sup>. To recover tourism development from the impact of the pandemic as soon as possible, some local governments in China have introduced supportive policies for the tourism industry. Fujian Province has introduced a diversified tourism policy mainly based on economic policy, and the practical results have verified the applicability of policy tools<sup>2</sup>. Zhejiang Province has introduced preferential policies to support tourism enterprises in the post-pandemic era, with tourism support policies focusing on development environment policies and market activation policies according to the needs of tourism enterprises<sup>7</sup>. However, few scholars have combined the international evaluation criteria framework for tourism development in the post-pandemic era with tourism policies to elaborate on the policy orientation of the recovery and development of the tourism industry. Some scholars have studied policy attention, believing that the policy attention for the development of rural tourism in China is manifested in macro guidance, micro support, and security bottom-up<sup>5</sup>. Other scholars have studied the balance of policy tools, revealing that China's health tourism development has a surplus of supply-side policies, while environmental and demand-side policies are insufficient<sup>13</sup>. These studies have laid foundation for this article to study the orientation of tourism policies.

This paper examines the tourism policy texts of Jiangsu, China from 2020 to 2023 and finds that the orientation of the policies is reflected in both vigorously stimulating domestic tourism market demand and enhancing the attractiveness of Jiangsu as a tourism destination, while also focusing on promoting the construction of Jiangsu as an international tourism destination and striving to revive the vitality of Jiangsu's international tourism market. Some scholars believe that in the post-pandemic era, tourism industry policies should establish a policy system themed around the tourism market environment and the operation of the tourism market, to play a guiding role in the recovery of the tourism industry<sup>6,7</sup>. This paper argues that the orientation of tourism policies should be aligned with the framework of international tourism development evaluation indicators.

## **2 TOURISM DEVELOPMENT EVALUATION INDEX FRAMEWORK**

Tourism industry policies have different objectives at different stages of development. China's tourism industry policy transitioned from the initial stage of development in 1978 to the stage of continuous improvement after 2000, and its policy effectiveness and policy orientation have also been continuously strengthened<sup>12</sup>. After the pandemic, the recovery of the tourism industry requires strong support from tourism policies. The orientation of the policy has an impact on the effectiveness of the policy<sup>11</sup>.

The World Economic Forum has been publishing "The Travel & Tourism Competitiveness Report" since 2007, establishing a set of effective and widely recognized Travel & Tourism Competitiveness Index (TTCI), which has become an important evaluation tool for world tourism development<sup>9</sup>. Especially the report "Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future"

published after the pandemic provides industry development evaluation standards for the recovery of China's tourism industry<sup>10</sup>. See Table 1.

**Table 1.** Framework of the International Tourism Development Evaluation Indicator System (World Economic Forum 2021 Edition)

First level	Favorable Environment	Travel and Tourism Policy and Enabling Conditions	Infrastructure	Travel and Tourism Demand Drivers	Travel and Tourism Sustainability
Second level	Business Environment; Safety and Security; Health and Hygiene; Human Resources and Labor Market; ICT Readiness;	Travel and Tourism Prioritization; International Openness; Price Competitive-ness;	Airport Facilities; Ground & Port Facilities; Tourist Service Facilities;	Natural Resources; Cultural Resources; Non-leisure Resources;	Environmental Sustainability; Socio-economic Resilience and Conditions; Travel and Tourism Demand Pressures and Impact;

Source: <https://www.weforum.org>

The greatest changes in the content of the indicator system are: first, the emphasis on "tourism demand drivers," evaluating the role of natural resources, cultural resources, and non-leisure resources; second, highlighting the factor of "tourism sustainability," and introducing socio-economic resilience and tourism demand pressure as evaluation indicators. In response to the reconstruction of the international tourism industry in the post-pandemic era, the World Economic Forum's 2022 report on the international tourism development evaluation indicator framework emphasizes two key indicators: tourism demand drivers and tourism sustainability. Here, tourism resources, especially non-leisure resources, become the main drivers of tourism demand, while socio-economic resilience, tourism demand pressure, and impact become important factors in the sustainable development of tourism. This also forms the main direction of tourism policy<sup>10</sup>.

This paper, based on the international tourism development evaluation indicator framework and focusing on four key indicators, takes Jiangsu, China as an example to study the guiding role of tourism policies in the recovery and development of the tourism industry. Many studies have shown that tourism policies can guide the tourism industry to continuously innovate in response to changes in the social and economic environment, while also stimulating the vitality of the tourism market, regulating tourism market operations, thus ensuring the recovery and healthy development of the tourism industry from crises<sup>1</sup>.

### 3 METHODOLOGY AND DATA SOURCES

This paper uses the grounded theory method to study the tourism industry policy texts of Jiangsu, China from 2020 to 2023. Through a three-tier coding process of open coding, axial coding, and selective coding, similar or related concepts are refined into main categories to further explore the categorical relationships. Grounded theory is essentially a typical inductive research paradigm. This paradigm does not set any theoretical assumptions in advance; it aims to address a research question by systematically categorizing a large amount of collected relevant raw data from the bottom up to construct a theory, extracting a theoretical system rooted in actual phenomena and data<sup>4</sup>.

#### 3.1 Data collection

The data for this study comes from the official website of the Culture and Tourism Department of Jiangsu Province, China. A search for "policies and regulations" yielded 33 pieces of information published between January 1, 2020, and February 2, 2024, resulting in 36 texts related to tourism industry policies and regulations. This paper uses the publicly available policies during this period as raw data for grounded theory analysis to explore the guiding role of tourism industry policy in the recovery of the tourism market after the pandemic and the changes in policy orientation before and after the pandemic. The original data texts of the tourism policies are shown in Table 2.

**Table 2.** 2020-2023 Tourism Policy of Jiangsu Government Data Statistics and Type scores

NO	Date of issued	Name of Tourism Policy	Type scores
01	20200109	Implementation plan for the reform of strengthening the protection and utilization of cultural relics	3
02	20200221	Legal guide on matters related to culture and tourism during the prevention and control of COVID-19	2
03	20200313	Notice on carrying out the activities of sending policies into cultural tourism enterprises	1
04	20200413	Notice of several measures to promote cultural tourism consumption	1
05	20200624	Action plan of tourism chartered bus special rectification	3
06	20200624	Action plan of high risk tourism project special rectification	3
07	20200624	Implementation plan of special rectification action for fire hazards in cultural and tourist places	3
08	20200624	Action implementation plan of passenger overload special rectification	3
09	20200630	Measures of identification and administration of intangible cultural heritage representative inheritors in Jiangsu	2

10	20200812	Measures of identification and administration of cultural industry demonstration area (bases) in Jiangsu	2
11	20200820	Measures of administration of key laboratory of culture and tourism	2
12	20200907	Measures of administrative enforcement of cultural market	2
13	20201109	Identification and management measures of intangible cultural heritage tourism experience base	2
14	20201224	Measures of the responsibility system for cultural relics safety	2
15	20210104	Guiding Opinions on promoting the integrated development of culture and tourism industries	2
16	20210105	Measures of administration of archaeology construction projects	2
17	20210105	Measures of administration of inspection of cultural relics protection projects	2
18	20210105	Measures of administration of completion and acceptance of cultural relics protection projects in Jiangsu	2
19	20210106	Interim measures for management of tourism uncivilized behavior records	2
20	20210129	Guiding opinions on promoting high-quality development of tourist homestays	2
21	20210311	Management measures of Jiangsu Province tourist charter bus safety	2
22	20210422	Work guide of Jiangsu unrestricted space non-heritage scenic area	2
23	202107-06	Tourism complaint warning mechanism of in Jiangsu	3
24	202107-29	Guide to construction of demonstration zone for integrated development of culture and tourism industry in Jiangsu	2
25	20211015	Jiangsu "14th Five-Year Plan" culture and tourism development plan	4
26	20211027	Identification and management measures of cultural and tourism equipment technology research and development center in Jiangsu	2
27	20211222	Measures for the withdrawal of qualifications for the restoration of movable cultural relics of Jiangsu	2
28	202201021	Several policy measures to promote the improvement and expansion of cultural tourism	2

		consumption and accelerate the comprehensive recovery of cultural tourism market	
29	20220510	Key points for optimizing the business environment in culture and tourism in 2022	1
30	20220613	Measures of administration of tourism resort of Jiangsu	2
31	20220722	Implementation plan for promoting the construction of world-class coastal ecotourism corridor	3
32	20220214	Measures of administration of classification of credit and culture of tourism Industry of Jiangsu	2
33	20230109	Guiding opinions on guiding the healthy development of non-state-owned museums	2
34	20230213	Specific policy measures on promotion of cultural tourism market to accelerate the comprehensive recovery	2
35	20230707	Implementation opinions on building intangible cultural heritage workshops to help rural revitalization	2
36	20230915	List of minor illegal acts in Jiangsu cultural market exempted from punishment and general illegal acts reduced from punishment	2

Source: <http://wlt.jiangsu.gov.cn/>

In Table 2, based on the original texts of the policies, the study utilizes a policy type and intensity evaluation scoring method (scored from high to low, 4 to 1 points) to categorize the types of policy texts. This includes laws and planning (4 points), outlines, mechanisms, plans, and schemes (3 points), methods, regulations, guidelines, decisions, opinions, measures, ordinances, and detailed rules (2 points), and notices, key points, and announcements (1 point)<sup>1</sup>.

### 3.2 Data analysis

#### 3.2.1 Open coding analysis

This article decomposes, examines, compares, conceptualizes, and categorizes the original policy text materials. After organizing the policy text materials, it extracts concepts and categories related to tourism development and names them. This article imports the 36 policy texts from Table 3 into NVIVO12 qualitative analysis software, transforming the policy texts into basic data sources for open coding. Through continuous organization and comparison of the original policy text materials, 25 concepts and 10 category groups are refined. See Table 3. It can be seen that Jiangsu's tourism policies have covered all aspects of tourism market development, laying a policy foundation for the recovery and development of the tourism industry in the post-pandemic era.

**Table 3.** 2020-2023 The result of open coding of tourism policy text of Jiangsu

<b>Policy number</b> <b>First categorization</b>	<b>Sample of original policy text statement</b>	<b>conceptualization</b>
01,09,13,16,17, 18,25,27,35 Tourism resources development	Enhance the protection and utilization of cultural relics, the identification and management of representative inheritors of intangible cultural heritage, the recognition and management of intangible cultural heritage tourism experience bases, inspections of cultural relic protection projects...	Heritage Protection and Utilization, Rich Cultural Resources
02,12,36 Tourism legal supervision	Resolve related legal affairs through legal and reasonable means, exempt minor violations in the cultural market from punishment, and mitigate punishment.....	Law Compliance, Punishment for Illegal Activities
03,20,30,33 Travel recovery support	Support enterprises heavily impacted by the pandemic, policies related to cultural and tourism enterprises, promote the development of homestays, strengthen the management of tourist resorts, non-state-owned museums, investments...	Supporting, Recovery, promotion
04,19,28 Tourism market guidance	Promote the cultural and tourism consumption market, manage uncivilized tourism behaviors, enhance and expand cultural and tourism consumption, nighttime cultural and tourism consumption, domestic market promotion.....	Guidance, Consumption, Market facilitating
05,08,23,29,31,32 Optimize tourism market	Special rectification of tourism charter buses, special rectification of passenger overloading, tourism complaint warnings, optimize the business environment, construction of world-class coastal ecological tourism corridors, credit grading and classification management in industry.....	Regulation of Market, Handling complaint, Environment
28,34 Tourism market promotion	Promote the rapid and comprehensive recovery of the provincial cultural and tourism market, accelerate the comprehensive recovery of the cultural and tourism market.....	Restore market, Revive economy
06,07,14,21 Tourism safety supervision	Special rectification of fire hazards in cultural and tourism venues, cultural relic safety responsibility system, safety of tourism charter buses, high-risk tourism projects.....	Crisis & Safety Management,
10,15,24,25 Cultural tourism industry development	Recognition of cultural industry demonstration parks (bases), integrated development of cultural and tourism industries, cultural and tourism characteristic advantages, national tourism demonstration.....	Promotion of culture tourism industry
25 International tourism development	The Hague Chinese Culture Center, overseas tourism promotion, World Economic Forum "Jiangsu Night", famous tourism destination with poetic water and cultural charm, international first-class destination, world-class canal cultural heritage, coastal ecological tourism, Yangtze River world-class city leisure tourism belt, internationally renowned, world-class, international standard...	International tourism destinations promotion

11,25,26 Tourism market foundation	Research and development of cultural and tourism equipment technology, key laboratories for culture and tourism, cloud tourism, online and offline tourism, digital art.....	Tourism Technology Foundation
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Source: Author

**3.2.2 Axial coding analysis**

Axial coding is the process that follows open coding, where the initial categories and concepts obtained during the open coding phase are subjected to further comparison, analysis, and refinement. This process aims to uncover the interrelations among categories, extract higher-level analytical dimensions from these relationships, and thereby construct core categories. See Table 4.

**Table 4.** 2020-2023 The main axis encoding result of Jiangsu tourism policy text

Preliminary categorization	Conceptualization	Dominant category
Tourism resources development	heritage and cultural relics protection and utilization, archaeological management	Resources
Tourism legal supervision	abide by the law during the epidemic and punish illegal acts	Support
Travel recovery support	enterprises to recover, supervision of enterprises, policy support	
Tourism market guidance	guide tourism consumption and promote tourism market	Demand
Optimize the tourism market	standardize the tourism market, warning of complaints, optimize the market environment	Market
Tourism market promotion	tourism market recovery	
Tourism safety supervision	tourism crisis management	Safety
Cultural tourism industry	cultural tourism industry promotion	Industry
International tourism	International tourism promotion	Internationalization
Tourism market foundation	technology, talent, public management	Foundation

Source: Author

In Table 4, through axial coding analysis, 8 core categories have been distilled: Tourism Resources, Tourism Policy, Tourism Consumption Demand, Tourism Market Environment, Tourism Safety, Tourism Industry, International Tourism, and Tourism Infrastructure. In other words, these 8 aspects are the leading directions of the tourism policies in Jiangsu Province, China, from 2020 to 2023.

**3.2.3 Selective coding analysis**

Selective coding further analyzes the main categories, exploring the connections between main categories, corresponding categories, and initial concepts. This process then distills more general and related core categories, thus constructing a theoretical



analysis framework. The result of selective coding is the identification of the core categories of tourism policy, which include: policy domains, policy incentives, and industry norms. These core categories are compared with international tourism development evaluation indicators, as shown in Table 5.

**Table 5.** 2020-2023 The result of selective coding of tourism policy text of Jiangsu

Dominant category	Core category	Policy content	International tourism development evaluation indicators (2021)
Tourism resources, Basic conditions, Enterprise support	Policy domain	society, culture, ecology, science and technology, talents, public services, preferential treatment, support, facilities, investment	Tourism sustainability
Tourism demand, Tourism industry, International tourism	Policy incentive	consumption guidance, market recovery, emerging business forms, tourism products, tourism industry, international tourism	Tourism demand driving force
Tourism market, Tourism safety	Industry norm	market supervision, regulation, complaint handle, risk warning, security prevention	Favorable environment, Policy conditions

Source: Author

## 4 RESULTS

Regarding industrial policy itself, the effectiveness of tourism industry policies is not only related to policy types and policy combinations but also to the number of policies<sup>14</sup>. This article employs the grounded theory method to analyze the tourism policy texts of Jiangsu, China, from 2020 to 2023. The research results indicate that the policies' orientation is not very clear.

In Table 2, the policy structure analysis shows that the strongest plans and the weakest notices only account for 2.77% and 8.33% of the total number of policies, respectively. The majority of policies have a medium level of force, indicating that the policy efforts are balanced, without a significant tendency towards any particular area, making the orientation of the policies average.

In Table 3, the analysis of policy content shows that the scope of policies covers various aspects of tourism development, including resources, markets, products, industries, enterprises, public services, and supporting conditions, which is quite comprehensive. It essentially includes the majority of the indicators in the international tourism development evaluation framework (see Table 2).

In Table 5, the policy orientation analysis indicates that the core categories of policies are reflected in three aspects: policy domains, policy incentives, and industry norms. These are indispensable policy conditions for the development of the tourism industry. Compared with the World Economic Forum's international tourism development evaluation indicator framework, it is not difficult to find that the policy domains

in Jiangsu's tourism policies reflect the sustainability indicators of tourism, and tourism demand pressures and impacts receive policy attention, but the socio-economic resilience is inadequately reflected. The policy incentives in Jiangsu's tourism policies are comprehensive, reflecting the tourism demand indicator of international tourism development, but there is a lack of attention to international openness and the internationalization of tourism. The industry norms in Jiangsu's tourism policies reflect factors in the international tourism development indicators, such as the business environment, infrastructure, and favorable conditions.

## 5 CONCLUSIONS

First, tourism demand drivers will become the engine of tourism market development. Beyond natural and cultural resources, non-leisure resources become a new carrier of tourism attraction. The development of non-leisure resources will enhance the attractiveness of business and other non-leisure travels, expanding the scope of the tourism market. Tourism policies can guide the construction of international tourism cities, the development of business travel, academic travel, medical travel, and other non-leisure travel markets. In practice, Jiangsu's tourism policies have stimulated tourism demand by supporting emerging tourism formats.

Second, sustainable tourism is the foundation of international tourism competitiveness. Environmental sustainability is fundamental to tourism development, and the environmental orientation of tourism policies is an important means to prevent market failures that damage the environment. Avoiding excessive tourism demand and protecting scenic areas are equally important. In practice, Jiangsu's tourism policies have regulated the explosive growth of tourism demand after the pandemic.

Third, the realization of sustainable tourism relies on socio-economic resilience. The presence of uncertainties, such as pandemics, brings instability to the tourism industry. To avoid the impacts and downturns that uncertainties can bring to the tourism industry, the orientation of tourism policies should include support for a diversified labor market, high-quality human resources, and investment in public resources. The research results indicate a gap and insufficiency in Jiangsu's tourism policies regarding economic resilience orientation.

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