Standing Committee for Commercial and Economic Cooperation of the Organisation of Islamic Cooperation (COMCEC)

DESTINATION MARKETING STRATEGIES IN THE ISLAMIC COUNTRIES

COMCEC COORDINATION OFFICE
September 2018

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TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

LIST OF ABBREVIATIONS

4 Ps:	Price, Product, Place, Promotion
ANOVA:	Analysis of variance
ASEAN:	Association of Southeast Asian Nations
ATIS:	Alberta Tourism Information Service
AUD:	Australian Dollars
BTA:	British Tourist Authority
CDMO:	Community Destination Management Organization
CEO:	Chief Executive Officer
CMV:	Common Method Variance
COMCEC:	Committee for Economic and Commercial Cooperation
CPR:	Canadian Pacific Railway
CVB:	Convention and Visitor Bureau
DCMS:	Department for Digital, Culture, Media and Sport
DMC:	Destination Management Company
DMO:	Destination Marketing Organisation
EFA:	Exploratory Factor Analysis
eWOM:	Electronic Word of Mouth
FMCG:	Fast Moving Consumer Goods
GDP:	Gross Domestic Product
HVB:	Hawaii Visitors Bureau
IACVB:	International Association of Convention & Visitor Bureaux
IAGTO:	International Association of Golf Tour Operators
IPS:	International Passenger Survey
ISED:	Innovation, Science and Economic Development
KPI:	Key Performance Indicator
LEP:	Local Economic Partnerships
MGA:	Multi-group analysis
MICE:	Meetings, Incentives, Conferences, Events
MoU:	Memorandum of Understanding
NTO:	National Tourist Organisation
OECD:	Organization for Economic Co-operation and Development
OIC:	Organisation of Islamic Cooperation
OTA:	Online Travel Agent
PCO:	Professional Congress Organisers

PPP:	Public Private Partnership
PR:	Public Relations
RMOW:	Resort Municipality of Whistler
ROI:	Return on Investment
RTO:	Regional Tourist Organisation
SSM:	Suruhanjaya Syarikat Malaysia
STA:	Scottish Tourism Alliance
TBMM:	Grand National Assembly of Turkey
TIAC:	Tourism Industry Association of Canada
TPS:	Targeting, Positioning, Segmentation
TRY:	Turkish Lira
TUGEV:	Tourism Development and Education Foundation
TÜİK:	Turkish Statistical Institute
TÜROB:	Hotel Association of Turkey
TURSAB:	Association of Turkish Travel Agencies
U.S:	United States of America
UK:	United Kingdom
UNWTO:	World Tourism Organisation
USA:	United States of America
USD:	US Dollar
WTTC:	World Travel and Tourism Council

EXECUTIVE SUMMARY

The objective of the report is to identify effective collaborative destination marketing strategies and policies, ideal structures, funding models and responsibilities of Destination Marketing Organisations (DMOs) to inform OIC member states. The report is based upon the results of three methodologies: (i) a comprehensive literature review of the destination marketing literature to identify good practice; (ii) three desk-based case studies of two non-OIC and one OIC member state (Canada, Turkey and the UK); and (iii) field visits to elicit the views of informed stakeholders and visitors in three OIC member states (Lebanon, Mozambique and Turkey).

Through the methodological approach described above the report identifies effective collaborative destination marketing strategies, the ideal structure of meta-marketing organizations and their responsibilities, explores funding opportunities and effective incentives on destination marketing efforts. The report also makes tailored policy recommendations for Lebanon, Mozambique and Turkey. These, together with a self-assessment template provide can be used by OIC Member States to support the adoption of best practice which is appropriate to their life-cycle development in terms of their own destination. To help with this process the report also includes an assessment of three OIC Member States – Jordan (Arab), Malaysia (Asia) and Senegal (Africa).

The literature review clearly identifies that destination marketing is maturing as a field and already has a rich vein of good practice that can be applied to OIC Member destinations. Particularly noteworthy is the evolution of the DMO towards a more general Destination Management Organisation, the pervasive role of technology as it impacts upon both industry and DMO operations and consumer behaviour, and the increasingly sophisticated governance of collaborative partnerships and networks of destination stakeholders in the destination marketing process.

The review shows that the process of destination marketing involves dealing with the complexities of destinations and their myriad stakeholders, whilst the outcome is a brand or the image of the destination.

In most countries, destination marketing is normally spearheaded and implemented by a destination marketing organization (DMO) or a visitor and convention bureau (CVB). Funding tends to be secured by the public sector with additional funds from private sector partners, often on a membership basis. DMO structures vary considerably and continue to evolve; traditionally they were departments or agencies funded by government to market the destination but there is an emerging trend for DMOs to be structured as public private partnerships (PPPs) to assure longer-term funding guarantees as well as proper accountability.

Tourism destination market planning provides a common point of reference for all stakeholders at the destination, acting as a coordination mechanism which is particularly important for destination marketing. It also encourages a disciplined approach to marketing by ensuring that objectives are set for markets and products, that each market has activities and resources allocated and the planning process itself sets key performance indicators (KPIs) against which the success – or otherwise - of the plan can be monitored. Common monitoring and evaluation techniques include return on investment and conversion studies. Market planning takes both a strategic, long-term and tactical, short-term approach. Increasingly these plans are flexible and subject to constant revision.

Funding of destination marketing is a critical issue for DMOs and to be effective they need the security of long-term funding. This is because DMOs cannot earn sufficient revenue from supplementary products such as advertising and booking fees. DMOs therefore are very dependent upon core government funding, but this leaves them at the whim of local politics. Indeed, with government in many countries reducing funding for DMOs, the search for alternative funding is often critically important.

The three desk-based case studies (Canada, Turkey and United Kingdom) clearly illustrate how a cohesive strategic plan, well executed, will deliver a good return on investment for those countries. The review of these three markets provides a comparative analysis of the relative success of destination marketing strategies adopted in each. All three countries reviewed are delivering successful outcomes, although there are some areas of the implementation which are more successful than others. Canada and the UK can be classified as at the mature stage of the destination marketing lifecycle. The analysis of these markets is useful to observe how they are dealing with the regeneration of demand in certain regions and the creation of new offers to stimulate continuous demand. Turkey is at an earlier stage of the lifecycle and provides a good contrast for comparison. These case studies provide useful insight into the approaches that have been adopted in successful tourism markets and can be adapted for use by OIC member states where appropriate.

The fieldwork research and analysis of three OIC countries: Lebanon, Mozambique and Turkey shows that whilst the visitors to those markets rated their experiences highly, the tourism stakeholders, with the exception of Turkey feel there is a great deal of potential that could be realised through the development of well communicated and funded strategic plans.

The report concludes with seven policy recommendations which can be summarised as follows:

1. Long-term funding for destination marketing should be guaranteed.
2. A cohesive destination marketing strategic plan is required.
3. Collaboration between government, regional agencies and commercial organisations is critical for effective destination marketing.
4. Ring-fence resources for DMOs.
5. Ensure policy facilitates and encourages innovation in destination marketing and prioritises digitization.
6. Ensure policy creates conditions for micro, small and medium-sized suppliers to be competitive.
7. Ensure that policy recognizes and supports key drivers of demand.

Keywords: Destination Marketing; Tourism Strategy; Tourism Development; Destination Marketing Organization; Tourist Destination Life Cycle; Destination Selection Criteria; Tourism Policy; Destination Attributes; Destination Image; Public-Private-Partnership; Best Practice; Destination Stakeholders

INTRODUCTION

This report is designed to inform *The Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation (COMCEC)* on tourism destination marketing strategies, structures, collaboration and governance models of destination marketing organizations (DMOs) in the OIC Member States. In order to ensure a competitive tourism sector across the OIC Member States, contemporary approaches to destination marketing strategy and collaboration are critical. The report therefore focuses upon destination marketing and branding to provide best practice guidelines on destination marketing planning and branding for OIC Member States.

The objective of the report is to identify effective collaborative destination marketing strategies and policies, ideal structures, funding models and responsibilities of DMOs to inform OIC Member States. The report is based upon the results of two key methodologies: (i) a comprehensive literature review of the destination marketing literature and three desk-based case studies - Canada, Turkey and the UK; and (ii) fieldwork to elicit the views of informed stakeholders in both OIC Member States and other countries, and a survey of consumers. Although destination marketing is a relatively new field, only emerging in the 1970s, it is already a rich resource of best practice and conceptual ideas. The destination marketing literature available has been accessed and analysed to inform the approaches that can be taken by OIC Member States depending on the structure, funding and stage of development of each.

It is known that both established and new destinations need to shape conditions and policies with regard to marketing for promoting tourism destinations in the OIC Member States. Effective marketing and branding requires utilization of the full range of tools available including digital marketing activities, social media, mobile phone applications and PR. Furthermore, COMCEC underlines the importance of multi-stakeholder engagement as a critical success factor for tourism branding.

For this project, destination marketing strategy and branding are defined as follows:

- ⇒ Destinations can be thought of as networked amalgams of organisations;
- ⇒ Destination marketing strategy provides a common point of reference for organisations acting as a coordination mechanism, ensuring a disciplined approach to marketing;
- ⇒ Destination branding can be thought of as the set of marketing activities that differentiate the destination from others; and
- ⇒ Collaborative marketing ensures involvement and commitment by all stakeholders in the destination marketing process.

There is varied terminology used by the industry relating to the bodies responsible for destination marketing and will ensure throughout the study that considers the activities of bodies that term themselves Destination <u>Management</u> Organisations and those that refer to themselves as Destination <u>Marketing</u> Organisations, or even Convention and Visitor Bureaux (CVB). Indeed, taking this broader view will allow us to consider the relationship between Destination Marketing and broader issues around the development of tourism within destinations.

Study objectives

The main objective of the study is to identify effective collaborative destination marketing strategies, the ideal structure of a meta-marketing organizations and their responsibilities, explore funding opportunities and effective incentives on destination marketing efforts as well as to suggest a legislative framework on how these organizations can best be empowered and audited based on empirical data, benchmarks and case destinations.

Methodology

The research approach adopted for this report comprises three aspects. Firstly, a desk-based literature review has been undertaken to evaluate best practice globally. This has been a comprehensive review and forms the first part of the report. In addition, a review of destination marketing across three OIC Member states was undertaken: Jordan; Malaysia; Senegal. Secondly, case studies of three different markets; two non-OIC countries (Canada and United Kingdom), and one OIC country (Turkey) have been completed. For the above a secondary research approach was adopted, making use of the resources available from a variety of sources.

And finally, primary research was completed through field visits undertaken in three further markets, all of which were OIC countries: Lebanon, Mozambique and Turkey. A mixed methodology approach was adopted, combining semi-structured interviews with key stakeholders and visitor feedback, through online questionnaires, to provide an holistic view of the destinations.

1. CURRENT TRENDS IN DESTINATION MARKETING

Destination marketing is a relatively new field, only emerging in the 1970s, but which already contains a rich resource of best practice and conceptual ideas drawn from the destination and the marketing literature. This literature review draws together this material to provide a best practice review of destination marketing focusing on four key areas – (i) competitiveness, (ii) destination management organisations (DMOs), (iii) the destination market planning process, and (iv) cross-cutting themes based upon technology, market research and collaboration.

It is clear from the review that destination marketing is maturing as a field and already has a rich vein of good practice that can be applied to OIC Member destinations. Particularly noteworthy is the evolution of the DMO towards a more general destination management organisation, the pervasive role of technology as it impacts upon both industry and DMO operations and consumer behaviour, and the increasingly sophisticated governance of collaborative partnerships and networks of destination stakeholders in the destination marketing process.

The review shows that the process of destination marketing involves dealing with the complexities of destinations and their myriad stakeholders, whilst the outcome is a brand or the image of the destination (Garcia, 2012; Gartner, 2018). In other words, a good destination marketing plan will focus upon two key operations:

- ⇒ Firstly, managing the destination's many stakeholders and networks; and
- ⇒ Secondly, formulating and managing the destination brand.

These two key operations are explained in detail in this review.

1.1. DESTINATION COMPETITIVENESS

Introduction

Contemporary destination marketing is central to the activities of DMOs, delivering destination competitiveness and a range of benefits to the destination. These benefits focus around the issue of differentiation, positioning and competitiveness and include (Cooper, 2016):

- ⇒ Securing the emotional link to, and loyalty of, visitors;
- ⇒ Coordination of the private sector and other stakeholders through cooperative marketing;
- ⇒ Acting as a base for promotion of other products such as investment, economic development, film, and TV;
- ⇒ Facilitating and encouraging the use of local products and design; and
- ⇒ Facilitating seamless market communication of the destination.

Definitions of Destination Competitiveness

Destination competitiveness is a particularly broad and complex concept with no generally accepted definition in existence. It can, for example, refer to a search for differential advantage among competitors. Equally, it can refer to the striving for superior quality (Kozak, 2002; Kozak and Rimmington, 1999). Interpretations will inevitably vary depending on the particular context in question (Dwyer and Kim, 2003; Go and Grovers, 2000; Grovers and Go, 2009). Dwyer and Kim (2003, p.370) go further to suggest that 'perspectives from various disciplines reveal that competitiveness is a multi-faceted concept' and that 'while the frameworks of competitiveness appearing in the wider literature are useful in highlighting the various determinants of "firm" or "national" competitiveness', they do not address 'the special considerations relevant to determining "destination" competitiveness' (Buhalis, 2000). Definitions of destination competitiveness include:

⇒ Ritchie and Crouch (2003) define destination competitiveness as "…[the] ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations" (p. 2). They also considered that competitiveness is related to the, "…ability of a destination to provide a high standard of living for the residents of that destination" (Crouch and Ritchie, 1999, p. 137);
⇒ D'Hauteserre's (2000) defines it as "the ability of a destination to maintain its market position and share and/or to improve upon them through time" (p. 23);
⇒ Dwyer and Kim (2003) suggest that the ultimate goal of competitiveness is, "…to maintain and increase the real income of its citizens, usually reflected in the standard of living of the country" (p.372); and
⇒ The Organization for Economic Co-operation and Development (OECD) (2013) has defined competitiveness as, "…the ability of the place to optimize its attractiveness for residents and non-residents, to deliver quality, innovative and attractive tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way."

Approaches to Destination Competitiveness

To be competitive demands that destinations thoroughly understand their positioning against their competitors' offerings and constantly innovate in terms of their product offering and their marketing (Dolnicar, 2018). In other words, destinations must research their own characteristics, product offering and markets as well as those of their competitors. The strategic nature of destination marketing involves understanding the competitive nature of the destination in question. Whilst this can be done by applying standard strategic marketing approaches to the destination - such as the *Boston Consulting Matrix* or *Porter's Strategic Forces* - these approaches do not translate well to the complexity of destinations (Cooper, 2016). This is partly because destination-marketing agencies do not control the product that they are dealing with.

There are three alternative approaches which work well for assessing the competitive position of destinations:

1. Firstly, Gilbert (1990) takes the approach of classifying destinations along a continuum from commodity to status area. The destination's position on the continuum assists in developing an appropriate marketing strategy and can be used to strategically reposition a destination, as was done by Spain in the 1990s. The strategic process is as follows:

a) Assess current position.
b) Select desired position.
c) Strategy to achieve desired position.
d) Implement strategy.

However, Gilbert's approach suffers from the fact that most destinations lie between the two extremes and it omits the evolution of destinations.

2. Secondly, Crouch and Ritchie (2012) have published widely on the issue with a comprehensive framework for analysing destination competitiveness. Their work is based on a major long-term research project aiming to define the elements that influence the competitiveness of destinations. They recognise that the destination is the fundamental product in tourism and that competition in tourism occurs between destinations and their relative features. This explains why many of the leading destinations in the world commit significant resources to destination marketing. Their approach systematically maps out a model for destination competitiveness, including tourism policy as an important influence. Here, Ritchie and Crouch see policy as comprising three parts - the structure of the policy in terms of umbrella guidelines, the content of the policy, and policy process in terms of how the policy is delivered.

   Their model of a destination has four key features:
   a) It distinguishes between the *physical resources* of a destination - such as beaches, and *the processes and activities* that occur around them to create tourism;
   b) It distinguishes between *natural resources* (climate for example) and *human elements* such as buildings, technology and culture;
   c) It identifies and defines the a*ctors* who create the destination; and
   d) It defines *destination governance and policy* 'vertically' by tier of government and 'horizontally' by partnerships.

They go on to identify the following key components of destination competitiveness (shown in figure 1):

Core resources and attractions – the main attractions that draw tourists to a destination.

1. *Supporting factors and resources* – the facilitating resources that sustain and support the visit, although they are not the main reason for visiting – they include access, accommodation and food and beverage.
2. *Qualifying and amplifying* determinants *or situational conditioners* - these determinants limit or nurture the ability of the destination to compete. They include factors such as the size and scale of the destination and levels of security. Of course, these may be outside the control of the destination itself, for example, the unrest in the Middle East renders many otherwise highly desirable destinations as almost no-go areas.

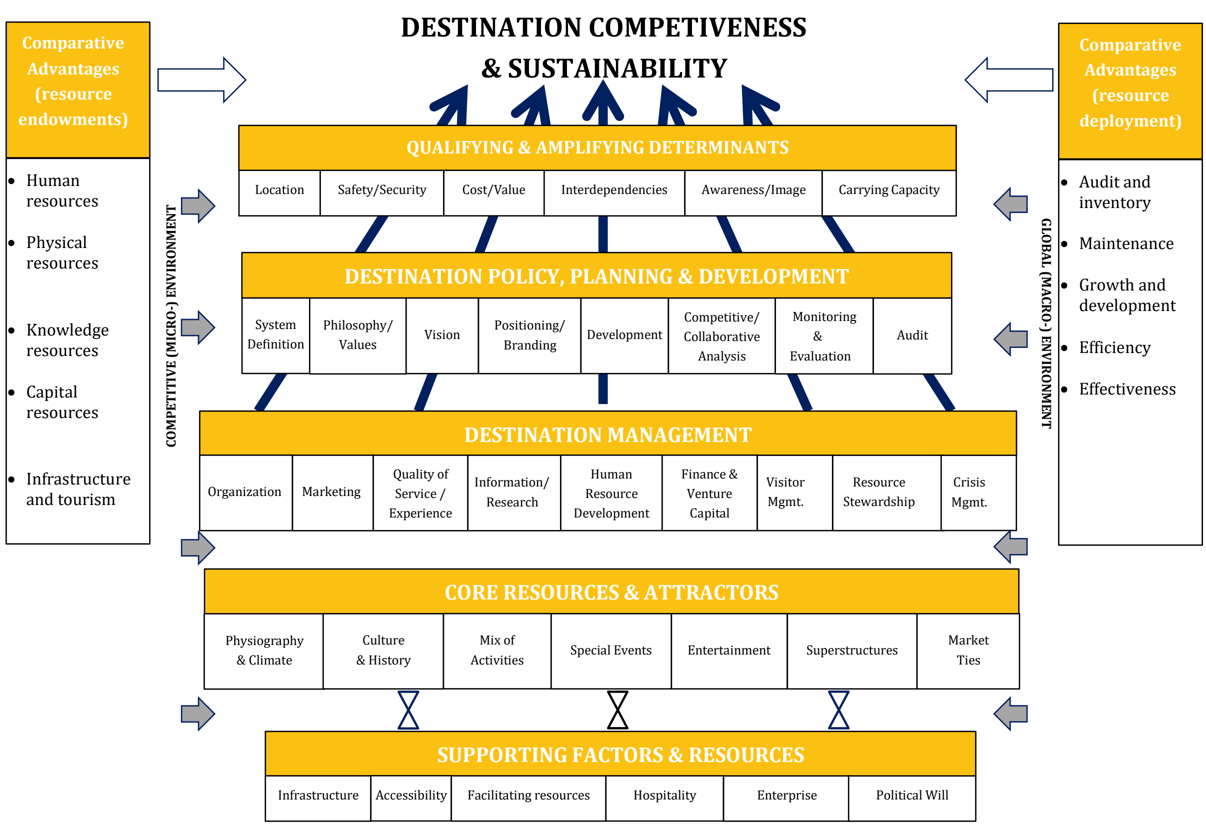
3. *Destination policy, planning and development* – the 'whole of destination' approach can influence the competitiveness of a destination. In contrast, badly planned and managed destinations will always find it difficult to be competitive.

4. *Destination management* – effective destination management delivers the visitor experience on the ground and ensures quality management and coordination of the destination products; again this can make or break a destination.

5. *Comparative versus competitive advantage* – in their model, Ritchie and Crouch make the distinction between the *comparative advantage* of a destination which comes from its endowed resources of say natural beauty or cultural heritage and *competitive advantage* which is linked to how effectively the comparative resources are employed. This will very much depend upon the local DMO.

6. *Global (macro) versus competitive (micro) environment* – here the model recognises that all destinations exist within a global environment and will be subject to forces outside their control – examples here could be demographics or global economic cycles. Equally, there are micro-level influences upon the destination which come from the tourism system itself, including, for example, changes in distribution methods of the product, or changes in transport provision to the destination. Both sets of factors influence destination competitiveness.

Figure 1 - The Competitiveness Model of Ritchie and Crouch



Source: Ritchie and Crouch

The third approach devised by Jain (1985; 2012) works well and has been adapted for destinations by Cooper (1995). He classifies the strategic options for destinations according to a two-dimensional matrix that takes into account the competitive position of the destination and the stage on the destination life cycle (see Tables 1 and 2). Jain's framework is linked to a comprehensive research and environmental scanning process, which is essential for destinations to understand not only the competitive environment and the consumer, but also the positive and negative associations of the destination brand. Similarly, the dual approach to competitiveness – conditions of resource availability and technology (comparative advantage) and the deployment of resources adjusting to customer preferences (competitive advantage) can be balanced according to life cycle stage and competitive position. Comparative advantage would steer policy towards increasing productivity, while competitive advantage would focus on improving the destination's tourism business climate.

The life cycle approach is attractive - as destinations become more popular, attracting countless more tourists, developers, and related industries, a plateau is eventually reached. Once destination growth reaches plateaux, the trend typically sees a decline in popularity and a need for newer, exciting introductions to attract more tourists. In an attempt to compensate for the decline in a destination's popularity as it reaches market maturity, those managing destinations tend to overcompensate by multi-segmenting the image of the destination to attract a broader audience. One of the challenges associated with this approach is that it frequently results in a traveller's perceived destination brand image that is inconsistent with the destination's intended image. As such, the brand image and integrity of the destination becomes skewed, undefined, and incompatible with the market, with destination re-positioning one of the means by which such an outcome can be rectified (Kozak and Martin, 2012). In a similar vein, Oehmichen (2012) comments that when destinations reach maturity in their life cycle, they ultimately must re-invent themselves to remain more competitive.

In many cases, however, destination re-positioning is not a result of simply reaching maturity in the life cycle as is evident from the example of New Orleans. For New Orleans, repositioning was the result of analysis of the devastation caused by Hurricane Katrina in 2005 (Chacko and Marcell, 2008). When potential tourists saw New Orleans under water they inevitably turned to other destinations because the images were of destruction, not re-construction or historical value. New Orleans had to therefore re-position itself as a tourist destination; creating a new brand image that incorporated not only their pre-Katrina history and culture, but also the history and image of overcoming the disaster. Re-positioning New Orleans as a destination has resulted in a dramatic increase in the size of its tourism market.

This is a useful approach in locating the strategic response of destinations to the wider competitive environment and one that should work well for this study as a means of classifying destinations and consequently, their appropriate marketing approach.

There are two further approaches to destination competitiveness which merit consideration:

1. One approach is to view destination competitiveness through the **business lens**, focussing on the microeconomic dynamics of competitiveness within a destination. This perspective involves disaggregating the destination into multiple firms with differentiated competitive positions, but who are all networked and working for the

overall good of the destination. In other words, tourism activity relies on offerings and services that businesses provide at a destination.

2. A second approach is to disaggregate the destination into a number of **attributes or components**, similar to the approach by Ritchie and Crouch outlined above. For example, the *World Economic Forum Travel and Tourism Competitiveness Index* is composed of three sub-indices:
   a) The travel and tourism regulatory sub-index;
   b) The travel and tourism business environment and infrastructure sub-index; and
   c) The travel and tourism human, cultural, and natural resources sub-index.

The sub-indices are made up of 14 pillars composed of 72 variables. In total the *World Economic Forum Travel and Tourism Competitiveness Index* consists of 174 indicators. The advantages of this approach is that a very comprehensive list of indicators is provided which covers off all types of destination.

Taking this a step further, Mazanec et al. (2007) stated the need for a performance orientation to competitiveness, "a comprehensive and artfully designed concept of destination competitiveness is of little value unless it actually relates to a destination's performance. In this case, competitiveness will acquire a role as a theoretical construct in a system of cause-effect relationships." (p.88). Croes (2011; 2018) has taken this on board and shifted the destination competitiveness debate from an input focus towards an output orientation. This approach is based upon comparative advantage by incorporating productivity and quality of life as the basis of destination competitiveness (Croes and Kubickova, 2013).

Underpinning all of the above approaches is the enhanced nature of competition in the destination marketplace and the seemingly endless quest to remain distinctive and competitive at a time of constant change. Although all of the aforementioned factors will impact destinations in different ways, for destinations of all types and regardless of the market(s) they attract, all follow development patterns that are consistent with the tourism life cycle (Kozak and Martin, 2012).

1.2. DESTINATION MARKETING ORGANIZATIONS (DMOs)

In most countries, destination marketing is normally spearheaded and implemented by a destination marketing organization (DMO) or a visitor and convention bureau (CVB) (Pike and Page, 2014). Funding tends to be secured by the public sector with additional funds from private sector partners, often on a membership basis (as discussed below). DMO structures vary considerably and continue to evolve; traditionally they were departments or agencies funded by government to market the destination but there is an emerging trend for DMOs to be structured as public private partnerships (PPPs) to assure longer term funding guarantees as well as proper accountability (Pike, 2018)(see also Table 3).

Pike (2018) characterises DMOs as "an entity officially representing a geopolitical boundary for the purpose of developing and coordinating a holistic marketing plan for the destination". To do this, DMOs have both a strategic aim and a range of tactical activities (Ford and Peeper, 2012):

⇒ Their strategic aim is to act as an umbrella-marketing agency by promoting the long-term development and marketing of the destination and consolidating the role of destination partners in this process. Increasingly too they are responsible for the economic development and inward investment to the destination.

⇒ This strategic aim is achieved through a variety of tactical activities, which include:

- Creating the destination brand to deliver awareness of the destination.
- Coordinating and leading destination stakeholders.
- Acting as an unbiased information clearinghouse for both the public and the travel trade.
- Commissioning research.
- Developing and implementing the destination-marketing plan.
- Developing funding resources to support the operation of the DMO.
- Developing the destination product and packaging.
- Monitoring service and quality standards.

The above list provides a realistic assessment of which elements of destination marketing the DMO can achieve, with a focus on promotion rather than the other 3 Ps of the marketing mix (Pike 2018). Of, course, these activities demand considerable investment if the destination is to develop a comprehensive destination marketing strategy. Here there are two key influences upon the operation of the DMO:

1. DMOs face the threat of disintermediation as their role is eroded by Internet bookings, user-generated content sites such as Tripadvisor, and tourist information delivered by the Internet. DMOs typically provide information for the early stages of destination decision-making, but other web-based companies are now moving in to occupy that role and close the booking (such as Expedia, Travelocity).
2. Coordination and leadership is needed at the destination level, and it is this strategic role that can be taken by the DMO. DMOs are often public sector funded agencies and therefore have the mandate to develop IT systems and leverage funding from destination partners. However, DMOs do not provide the final tourism service and therefore have to forge collaborations and partnerships with commercial firms to deliver and implement a seamless experience for the visitor (Zach 2011).

These two factors mean that the DMO must evolve beyond being a simple marketing organisation into an agency that manages and develops strategy for the whole of the destination. It is also linked to a trend for professionalism amongst DMOs as administrative structures flatten and the DMO is held accountable to the community. There is a concern here however, that DMOs do not have the authority or control to implement a thorough management approach (Pike 2018). This is changing the way that DMOs report and measure their performance, with statistics such as return on investment (ROI) from promotion and of enquiry conversions more important than simply the number of enquiries, as discussed below (Morgan et al, 2012). Finally, all DMOs are recognising that innovation and partnerships are a key aspect of their work.

These factors mean that there is debate about whether DMOs are *management* or *marketing* organisations. Effectively, DMOs have to adapt to the contemporary operating environment of tourism. This means (i) balancing the conflicting needs of the many destination stakeholders, including the host community; (ii) adapting to a rapidly changing and empowered tourism marketplace; and (iii) understanding how to leverage from digital technologies in an increasingly technology-influenced market place. Increasingly, DMOs are acting as 'management organisations' delivering 'whole of destination' management approach (Carter 2006). Ritchie and Crouch (2003, pp.73-74) support this notion by emphasizing the provision of a form of 'leadership in destination development that makes extensive use of teamwork in all DMO-led initiatives. Destination marketing and promotion is no longer the sole purpose of the DMO. While this modified role presents many new challenges, it also provides a much broader range of opportunities for ensuring destination competitiveness (Haati and Komppula, 2006). One of these wider roles is economic development. Some DMOs have been incorporated within Economic Development Agencies. Examples include New Zealand (Ives, 2016) and the Local Economic Partnerships (LEP) in the UK (Pike and Page, 2014).

However, in terms of seeing DMOs as management organisations, Pike (2018) urges caution. He states that

> "Few DMOs have had, or will have, the mandate and/or regulatory and operational control over resources at the destination to the extent that could reasonably be considered as enabling *management*. Few DMO staffers would be considered *managers* of their destination and are more likely to be referred to as destination *marketers*. In this regard the world's largest collective of DMOs is known as Destination Marketing Association International".

DMO Governance

DMOs are the result of a community becoming formally organised to promote their destination, with most established either by government as a department/division, particularly at the NTO and STO levels, or as a cooperative membership-based alliance of private sector businesses at the RTO/CVB level (Pike, 2018). The rationale has been to enhance the destination's competitiveness. As noted above, over time there has been an evolutionary shift towards DMOs structured as public-private partnerships (PPP). A PPP is commonly a division of government, governed by a largely private sector board of directors who are responsible for the appointment of the CEO and the ratification of organisational strategy. PPPs are underpinned by recognition that:

1. Long term funding certainty can only be provided by government; and
2. While DMO governance requires adequate taxpayer accountability and reporting, it is the private sector that has the expertise to efficiently and effectively oversee the management of the organisation's strategy.

For DMOs working in partnership with the private sector there are a number of issues to consider. These include:

- ⇒ The process of board member selection; and
- ⇒ The roles and responsibilities of the board, and ethics around decision making on behalf of stakeholders.

The nature of the PPP structure means politics can be a key influence in DMO decision-making (Ryan and Zahra 2004). Halkier (2014, p. 1664) for example observed that Denmark's competitiveness as a destination has been hampered by the governance style of RTOs, which feature "geographic localism and short-term interests" in decision making. Nardi et al (2016) introduced the term *collaborative thuggery* to the destination marketing literature to sum up how the multi-stakeholder branding decision process for the Gold Coast in Australia was shaped to suit the needs of powerful individuals.

Here the organisational structures of DMOs differ widely. There are three basic organisational structures. Firstly, some DMOs have a structure based on geographical markets where each department deals with a world region. Secondly, a DMO can have a structure based upon marketing functions such as promotion. This is less common. Finally, an increasingly common approach for the structure of a DMO is a matrix structure whereby geographic markets and marketing functions are combined.

DMO Performance Monitoring

The monitoring of DMO marketing performance has grown in importance as the accountability of public finances has become an imperative. Of course, DMOs claim credit when results are positive. To quote Craik (1991, p. 24), 'in boom times, tourist bodies typically take the credit for increased visitation and infrastructure development, while, in downturns, the same bodies blame the lack of government funding and seek increases to budgets'. There are a number of approaches used to assess the effectiveness of destination marketing as outlined below.

Return on Investment

Metrics for assessing the return on investment (ROI) for marketing spend include visitor numbers, visitor spending, and tax revenue (Pike, 2016). However DMOs generally find it difficult to develop meaningful KPIs because of the open system they operate in where not all visitor arrivals are not directly controlled or influenced by marketing spend. To quote Pike and Page (2014, p. 211), 'despite the existence of DMOs for over a century, the first forty years of destination marketing literature has been surprisingly devoid of research that addresses the question 'to what extent are DMOs responsible for increases in visitor arrivals, length of stay, spending and other performance metrics related to destination competitiveness?'

The research supporting ROI assessment includes visitor arrival statistics from NTO surveys (Gitelson and Crompton 1984, Gyte and Phelps 1989, Oppermann 1996, Pyo, Song and Chang 1998), government airport immigration data and/or local visitor monitor programmes (see Pike, 2016). Other metrics include length of stay, visitor spending, the ratio of DMO marketing spend compared to spending by visitors from target markets, the number of marketing relationships forged with partners, and the ratio of DMO spend to other partners' spend on marketing, and the ratio of visitor spending growth compared to employment growth.

However, as Pike (2018) states, an accurate measure of ROI is very difficult because DMOs use performance indicators evaluating what *can* be measured, rather than what *should* be measured (Morgan et al, 2012). On any given day, visitors at a destination will be there as a result of one or more of a diverse range of factors including, but not limited to: promotions by the DMO, local tourism businesses and travel trade intermediaries; word of mouth from significant others, either in-person or from user-generated content on social media; e-word of mouth, ancestral links, and family occasions such as weddings and memorials; news media editorials, *product placement* in movies or television; special events and business meetings; or medical reasons. Therefore, it will always be extremely difficult to isolate the effect that the specific work of the DMO has on visitor arrivals, length of stay, spending, or and/or tax revenue. For example, research by the UNWTO and European Travel Commission indicated that while 82% of NTOs had a formal brand strategy, one third of these DMOs had no plans to evaluate the effectiveness of the campaign (Morgan, et al, 2012). Morgan et al (2012, p.p.75) suggested DMOs were not addressing four critical issues in performance measurement:

- The extent to which additional visitor spending has increased through above-the-line advertising;
- Online marketing activities;
- The effect of branding on consumer behaviour; and
- The increasing emphasis on public relations management and social media engagement.

Conversion Studies

Conversion studies examine whether destination advertising increases sales, through conversion studies. These include the effectiveness of: coupons, direct response marketing, travel trade events, brochures, promotional videos, public relations (Frisby, 2002, Castelltort and Mader 2010, Stepchenkova and Mills 2010), and social media (Munro and Richards 2011, Oliveira and Panyik 2015).

The issue of DMO efficacy and the effect of destination marketing on destination competitiveness will become increasingly important in ensuring funding certainty from governments faced with increasing costs for essential services. What will be particularly valuable are the development of models of effectiveness that enable tracking over time and benchmarking with competitors.

To conclude, identifying the overall contribution of DMO efforts to the overall success of the destination is very difficult to assess. Pike (2004, p.36) argues that the 'lack of suitable data leaves the industry open to attack from politicians and other industries seeking justification for funding from the public purse'. He adds that 'isolating and quantifying a DMO's contribution to destination competitiveness is currently an impossible task. Ultimately the success of a destination will be as a result of a combination of factors, many of which will be exogenous to the DMO' (Pike, 2004, p.190).

Finally, despite the many excellent examples of good practice internationally, DMOs face a set of very challenging issues from the point of view of marketing the destination. These stand in stark contrast to the role of say, a brand manager dealing with manufactured goods.

DMOs:

- Can only coordinate the promotion of the tourism destination, because this is the only one of the four Ps of the marketing mix where they can exert direct control. DMOs usually have little influence over the other Ps: product, price, and place. Of course, there are exceptions to this. For example, DMOs can also control price by limiting supply through licensing accommodation (such as Airbnb), or can influence demand through introducing additional fees and taxes, DMOs;
- Control neither destination product quality nor the private sector and as a result cannot influence the product quality or mix;
- Politically they have to treat all stakeholders as equal and therefore cannot be seen to 'back winners';

- ⇒ Tend not to be entrepreneurial;
- ⇒ May lack marketing expertise and focus more on economic development and investment;
- ⇒ Can only facilitate bookings and often cannot close a sale;
- ⇒ Often have budgets that are inadequate for significant promotion and market research and the typical 12 monthly budgeting cycle is problematic; and
- ⇒ View the destination as bounded by political boundaries which makes a cooperative or regional approach to marketing difficult.

1.3. TOURISM DESTINATION MARKET PLANNING

Tourism destination market planning provides a common point of reference for the organisation acting as a coordination mechanism which is particularly important for destination marketing (Cooper, 2016). It also encourages a disciplined approach to marketing by ensuring that objectives are set for markets and products, that each market has activities and resources allocated and the planning process itself sets key performance indicators (KPIs) against which the success – or otherwise - of the plan can be monitored. Market planning takes both strategic, long-term and tactical, short-term approach. Increasingly these plans are flexible and subject to constant revision.

The Strategic Level of Destination Marketing

Strategic Focus

There are two clear strategies in terms of focussing marketing effort:

1. A mass marketing approach where it is assumed that the needs of all consumers in a market can be satisfied with the same product, that they will pay the same price, use the same (range of) distribution channels and that advertising and promotions action can be developed that will attract the attention of all consumers (Dolnicar, 2018). Examples here would include Spain and Greece.
2. A concentrated or differentiated approach focussing on one or a small number of consumer groups within the entire market. In this approach it is assumed that any market contains market segments. Examples here would include Mauritius which has taken a concentrated approach to segmentation. Mauritius has aggressively targeted the luxury end of the beach market assuming that the segment shares a similar level of interest in the same, or comparable, set of needs. Mauritius has benefitted from the fact that the needs of the luxury segment are homogeneous and distinct, and the island has developed a customized product of luxury, up-scale resorts to satisfy their specific needs particularly well. This approach is also cheaper to implement than a mass marketing strategy which aims to communicate to the entire market.

These strategies depend upon three critical marketing approaches of targeting, positioning and segmentation (TPS) (Dolnicar, 2018; Lilien and Rangaswamy, 2003) (see Table 4 for an overview of the process of TPS).

Market Segmentation

A market segment consists of a group of customers within a market who share a similar level of interest in the same, or comparable, set of needs (McDonald and Dunbar, 2012). Market segmentation allows destination marketers to tightly define subsets of the market and allows those grouped to be targeted in terms of formulating products and devising marketing campaigns. Despite the obvious importance of market segmentation, destinations have been slow to adopt a sophisticated approach with some arguing that it is a rather arid and academic approach to marketing with little real-life relevance. Nonetheless, market segmentation has much to offer destinations (Cooper, 2016). To be successful market segments must have a number of key features. They must be:

Figure 2 - Critical success factors for market segmentation

Measurable	There is no point in creating a sophisticated approach to segmentation if the group cannot be measured on variables that allow them to be identified and reached by the marketer
Substantial	Segments must be large and profitable enough to be worth devising campaigns or products to meet their needs
Durable	Segments must be durable in terms of time. If a company is targeting a particular segment it needs to be confident that the segment will remain stable for a number of years
Competitive	the company must be confident that it has a competitive offering to attract purchasers from the particular segment

Source: Cooper, 2016

Segmentation in tourism has taken a traditional ‘common sense’ approach in the past, for example segmenting by demographics or by geography. In part this is because tourism statistics are organised in this way making it relatively easy to identify these segments. However, in the twenty first century, and with the support of sophisticated market research and technology, it’s possible to be much more creative in segmentation. This involves adopting a ‘data-driven’ approach including variables such as use of technology, preference for adventure and overall leisure lifestyles. It is also possible to apply social technographics which segments consumers according to their behaviour on social networking sites. These contemporary approaches to market segmentation demand sophisticated research techniques including qualitative market research and multivariate analysis. Deep and meaningful research underpins new approaches to segmentation that can deliver detailed customer profiles and identify elements of consumer behaviour. The following are common segmentation approaches used in tourism:

- ⇒ Demographic, using standard census-based data to segment the market by gender or age.
- ⇒ Socio-demographic, which combines demographic data with social variables such as family size.

- ⇒ Geographic, using standard geographic data such as address or country of residence.
- ⇒ Geo-demographic, a more sophisticated approach combining demographics with data such as post or zip codes to map where particular segments live.
- ⇒ Buyer behaviour, where particular purchasing groups, such as business or leisure tourists are grouped together. This can be more sophisticated however, using segments of late bookers, or of adventure travellers.
- ⇒ Psychographics, a more sophisticated approach, reliant on qualitative market research and multivariate analysis to segment the market by psychological profiles.
- ⇒ Increasingly, segmentation based upon experiences will be developed.

Targeting one market segment is referred to as a concentrated destination marketing strategy and is the preferred approach by most destinations as it allows concentration of resources. Targeting a number of market segments (but not the entire market as one entity) is referred to as differentiated destination marketing.

There are clear benefits in targeting one or a small number of market segments (Dolnicar, 2018). These include gaining a long-term competitive advantage because the targeted segments, over time, identify service providers who are best at satisfying their needs. It is also more resource efficient approach. It allows the destination to focus on the communication channels which have the highest likelihood of reaching the targeted segments.

The literature offers a large number of possible criteria for selection of market segments (Croft, 1994; Day, 1984; Dibb and Simkin, 2008; Jain, 2012; Kotler and Keller, 2012; Myers, 1996; Perreault Jr and McCarthy, 2002; Pride et al., 2012; Sharp, 2013; Solomon et al., 2011; Sternthal and Tybout, 2010; West et al., 2010; Winer and Dhar, 2011). Dolnicar (2018) groups these into two categories:

- ⇒ **Knock-out criteria**. If a segment does not comply with one of the knock-out criteria it needs to be entirely removed from further consideration. If it does comply with all knock-out criteria, it is evaluated and compared to other potential target segments, using attractiveness criteria. Typical knock-out criteria include homogeneity (segments members should be similar to one another in the key feature of interest), distinctness (the needs of the segments should be distinctly different from the needs of other segments), size (the segment should be large enough to be worth focusing on), match (the destination, business or organisation should be particularly good at satisfying the specific need of the segment), identifiability (it must be possible to determine whether a tourists does or does not fall into a certain market segment) and reachability (it must be possible to reach the segment) with communication messages and through distribution channels (Lilien and Rangaswamy, 2003; McDonald and Dunbar, 2012; Wedel and Kamakura, 2000).

- ⇒ **Attractiveness criteria**. Commonly used attractiveness criteria include competitive advantage (the luxury segment for Mauritius, see above) profitability (villas with pools in Greece), growth potential (the all-inclusive market in the Caribbean), barriers to entry (luxury resort market), and life cycle position (Spanish beach tourism). Destinations can identify attractiveness criteria which are uniquely relevant to them.

Once the market segments have been identified they need to be profiled and described to understand and develop a clear picture of their nature and key characteristics. Typically, market segments are described using socio-demographic criteria such as gender, age, income, education as well as travel-related variables such as travel motives, expenditures, preferences, number of short and long trips undertaken each year, typical travel party and accommodation preference (Dolnicar, 2018).

Target Markets

Identifying target markets is critical because it is at this point in time that irreversible decisions are made about whether to go for a mass market or differentiated approach. Selecting a market segment for targeting is a long-term commitment because it takes a lot of time and effort to reorganise organisational resources to customise the product or service to the specific needs and requirements of the selected target segment (Dolnicar, 2018). Once a target segment is committed to, it typically stays the focus of destination marketing effort for many decades.

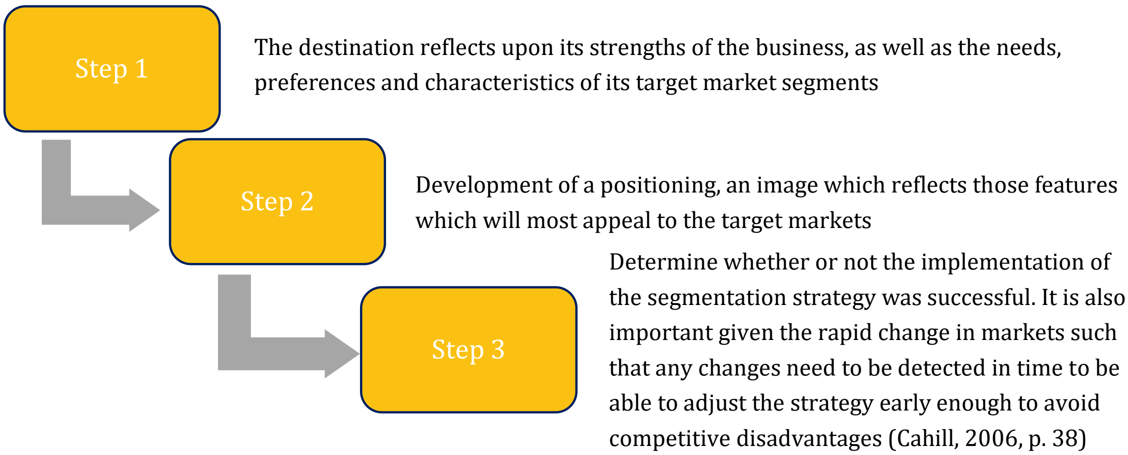
An aspect that needs to be considered when selecting more than one market segment is segment compatibility, in other words that the markets visiting the destination are in harmony and not in conflict (Cooper, 2016; Dolnicar, 2018).

Positioning

Kotler et al. (2005, p.280) provide a definition of market positioning as the "way a product is defined by consumers on important attributes – the place the product occupies in consumers' minds relative to competing products". This is equally true of destination positioning and re-positioning with a major objective of any destination positioning strategy being to reinforce positive images already held by the target audience, correct negative images, or create a new image. As such, positioning is a natural extension of market segmentation and targeting with destinations constantly under review with regard to a myriad of factors that include destination attributes, price, competitor destinations and tourist type (Chacko and Marcell, 2008).

A key strategic component of a destination marketing plan is therefore the positioning of the destination or product against the competition using a combination of targeting and segmentation. Positioning ensures that the destination delivers a unique position in relation to its competitors and occupies a particular place in the minds of potential tourists. Positioning determines how the market sees a destination. It is therefore a powerful tool in strategic marketing which affects tourists' perceptions (Dolnicar, 2018). Positioning is based upon differentiation, cost and developing a unique focus. Positioning must be consistent with cost and value for money, market trends and consumer preferences, convenience of purchase, technology and demographic trends (Pike and Ryan, 2004). Finally, positioning must take into account the capability and resources of the destination to deliver the promise. Destination market plans take a disciplined approach to positioning involving a number of discrete stages (Dolnicar, 2018).

Figure 3 - Destination marketing stages in market positioning



Source: Dolnicar, 2018

For many destinations rethinking their positioning presents an opportunity to rejuvenate their marketing. Recent examples include Las Vegas, New York City, Glasgow, Amsterdam Each of these examples have combined strategic approaches to re-positioning with more widespread policy, governance and economic reforms. The section below provides two detailed examples:

Las Vegas attracted in excess of 40 million visitors in 2015 so its success in attracting visitors on a mass scale is unparalleled. However, its market positioning has been challenged in recent years in response to a variety of macro-scenario changes which include, among others: financial crises and economic recession; demographic changes and shifting patterns of mobility; destination politics and governance; changing patterns of tourist behaviour and consumption; and, the emergence and impact of the "sharing economy". At the same time, Las Vegas continues to seek alternative, "non-tourism" models of growth as it aspires to be a more balanced, healthy, vibrant and resilient destination for both visitors and residents alike. Hence, it is seeking to protect, strengthen and diversify their existing destination "positions" while at the same time navigating internal city pressures to broaden their "non-tourism" economic bases without damaging their touristic competitive advantages.

Amsterdam Marketing and its partners have already been experimenting with a positioning approach - "Visit Amsterdam, See Holland". The main objective of this project is to entice international visitors staying in Amsterdam to discover the surrounding region, thus enabling a better distribution of visitor flows in space and time. The project began in 2009 and brought 16 areas of interest under the attention of international visitors, each with a unique character. With time, some fine-tuning and clustering took place but the basic idea remained unchanged.

The positioning approach grew out of the 'I amsterdam' brand which was launched in 2004 by the Municipality of Amsterdam in order to improve the overall attractiveness of the city. The management of the brand was entrusted to a newly-created platform for government, industry, the region and organizations with marketing and promotional objectives: Amsterdam Partners. Helped by the creation of the 'I amsterdam' brand, Amsterdam experienced a massive growth of tourism both on the demand and the supply side. However, it also led to a debate in the city about the negative aspects of tourism. These changing attitudes toward tourism pushed key players in this field to adapt and redefine their strategies.

As a result, Amsterdam Marketing progressively changed from being a destination marketing organization to a destination marketing and management organization, the Municipality of Amsterdam is affirming its role as a key player within the discussion around balance in the city. In 2015, the Municipality launched "City in Balance", a new program based on three core values:

- ⇒ Amsterdam aims to be an appealing city for everyone
- ⇒ Amsterdam embraces growth and prosperity whilst preserving its liveability
- ⇒ Amsterdam chooses to operate on a human scale

Because of the diversity of challenges which "City in Balance" needs to address, the program has a transversal nature. "City in Balance" identifies four different ways of channelling growth:

1. Make the city larger so as to achieve a better distribution of visitor flows;

2. Make the city smarter thanks to the use of technologies and collaborate with knowledge-based organizations located in the destination;

3. Seeing the city differently by conducting experiments from which the city could learn such as an app encouraging visitors to use routes "off-the-beaten" track; and

4. Calling on people to work together to reach its objectives.

A number have also used the hosting of sporting festivals and events to stimulate a deliberate change in focus (Insch and Bowden, 2016). In the case of Brisbane, Insch and Bowden (2016) advocate positioning elements, positioning approaches and re-positioning strategies as the stages necessary for successful re-positioning to take place:

1. The first; *positioning elements*, identifies the desired target market, the competitive frame of reference (i.e. specific competitor), points of difference (i.e. functional, hedonic and image attributes of a brand) and the desired criteria for the market to truly believe the re-positioning taking place.
2. The second; *positioning approaches*, offers exclusive positioning whereby there is a different position for different target markets, concentrated positioning where the same positioning exists for one or more target markets, or uniform positioning strategies where place brands serve all the needs of the different markets.
3. The final stage; that of *re-positioning strategies*, offers a choice of three options consistent with the views of Kotler et al. (2005).

In the future, the 24/7 availability of large amounts of data will merge the separate processes of TPS into one, where a future system will be continuously fed data and produces – on a continuous basis – market solutions (Dolnicar, 2018).

The Tactical Level of Destination Marketing

The tactical level of destination marketing is focused upon marketing campaigns (Cooper, 2016). Here, the starting point is to take the target market segments identified in the processes above and then to use elements of the marketing mix to approach that market. With the move to a service-dominant logic, the marketing mix can be expanded from the traditional 4 Ps to include other influencing variables such as the people involved in delivering the service, the physical setting - or servicescape – where which the service is delivered and the actual process of delivering the service (Vargo and Lusch, 2004).

The key driver of any destination marketing plan is the satisfaction of consumer needs (Dolnicar, 2018). This has a range of benefits as Dolnicar (2018) identifies:

- ⇒ Visitors are satisfied,
- ⇒ They are more likely to return to the destination or,
- ⇒ Use the services of a specific tourism business or organisation again at a different destination, and
- ⇒ Visitors are more likely to share their positive experiences either personally or through social media with other tourists.

The Destination Product

In terms of the destination product the literature speaks of a 'destination amalgam' (Cooper, 2016). In other words, the tourism product is an 'amalgam' of destination elements including attractions; supporting services including accommodation and food and beverage; and transportation. There are significant implications of this 'amalgam' for destination marketing, particularly the challenge of managing quality across the various elements, each of which is often supplied by a different organization. The challenge is simple – any element of the product that is of poor quality compromises the rest of the product bundle and means that the tourist will leave with a negative impression of the destination and may not return.

Price

Tourism demand at the destination is both perishable and highly price elastic which means that consumers will switch products on the basis of price, hence the need for careful destination positioning. As a result, pricing is a critical element of the marketing mix, yet it is also one that is subject to government regulation (for example air fares) reducing the options of the destination marketing manager. Here, destinations can influence government regulation of prices through lobbying - for example in regulation of Airbnb, bed tax or airport landing fees. This is commonly done through the destination trade associations, hoteliers and food and beverage associations. These associations also group together to leverage supplier pricing which again impacts upon the destination's price competitiveness.

There are both strategic and tactical approaches to pricing. Tactical approaches can be clearly seen in the windows of travel agents and on airline web sites where prices are reduced to offload excess capacity close to the date of departure. Strategic approaches to pricing for destinations include:

Figure 4 - Strategic approaches to pricing

Cost-oriented pricing	Rate of return pricing	Demand oriented pricing	Discrimination pricing	Backward pricing	Penetration pricing	Skimming pricing
where the price is determined by the cost of providing the product, not always easy to do in tourism	where the price is determined to deliver a set rate of return for the company at the destination	here the price is set according to what the market as prepared to pay	where prices differ according to different market segments (students or seniors for example) or season	where the price is decided upon and then the product 'reverse engineered' to deliver that price. For example, using hotels a few blocks from the beach	here a low price is set in the early stages of the life cycle in order to build market share	with this strategy the destination often has a monopoly on a shortage product and can charge a premium price, for example villas with pools on Greek islands

Source: Cooper, 2016

Promotion

The nature of tourism as an experience product, albeit with many tangible elements, means that it particularly lends itself to promotion. Also, the tourism market tends not to be loyal and so demand for tourism products at the destination is unstable, as well as seasonal and price sensitive. This means that promotion can play a powerful role in influencing demand, reducing seasonality and creating loyalty. Promotion is about persuading, informing, reminding and communicating benefits to the potential consumer. Promotion in destination marketing does not stand alone and is used to support other elements of the mix, for example it can communicate pricing strategy. Smart tourism promotion intervenes in the tourism purchasing process to influence behaviour. Here the key decisions for the destination are what type of message to promote and when to send the message to ensure maximum impact. Choice of media is also critical and increasingly promotion is done using electronic media, social media and 'viral campaigns' on web sites such as YouTube.

Distribution

In tourism a distribution channel is:

> 'an operating structure, system or linkages of various combinations of travel organisations through which a producer of travel products describes and confirms travel arrangements to the buyer' (Cooper, 2016).

Sometimes known as intermediation, distribution is an important element of the tourism industry and carried out by intermediaries - travel agents and tour operators/wholesalers – who have increasingly been impacted upon by newcomers in the market in the form of e-distribution companies such as Expedia. The nature of tourism distribution has been transformed by the Internet and its use by both new style e-intermediaries and tourists themselves, seeking to bypass intermediaries has had a major impact on destination marketing (Buhalis and Laws, 2003).

As with other elements of the marketing mix, it is important for destinations to take a disciplined and planned approach to distribution (Cooper, 2016). This will ensure that the type of channel used will conform to the destination's promotion and design, as well as supporting the pricing strategy.

Distribution is one of the elements of the marketing mix that has been transformed by technology. Liu (2000) notes that electronic distribution has a number of advantages (and these apply to destinations):

- ⇒ Drastic cost reduction achieved through the electronic processing of bookings (such as e-tickets and electronic confirmations) and other transactions;
- ⇒ Automation reducing labour costs and office space;
- ⇒ Direct and personal links to the customer; and
- ⇒ It encourages customer-driven distribution through social media and web sites such as Tripadvisor

Electronic distribution has decimated traditional intermediaries such as 'bricks and mortar travel agents'. Tour operators on the other hand, are reinventing themselves with the ability to flexibly package the product (dynamic packaging) and to deal directly with their customers. This shows that electronic distribution works well for tourism destinations where the product is fragmented, and web portals allow companies to provide and deliver a dynamic assembly of all of the elements of the product (Expedia is a good example here). Buhalis (2003) suggests that in the future tour operators will fall into two distinct groups:

1. Multinational, large and vertically integrated operators with economies of scale, wide distribution and a global network, taking a high volume, low profit approach; and
2. Small, niche differentiated operators focussing on particular destinations or products, taking a low volume, high profit approach.

Destination Branding

The DMO plays a central role as the destination brand champion and provides a framework for promotional activities. The premise being that all marketing communications should reinforce the destination's brand identity.

Destination branding is therefore central to the contemporary destination marketing process – to quote Kotler et al (2003: 418) 'branding is the art and cornerstone of marketing'. The role of a brand is to offer a better proposition, distinct from competitors and communicate meaning above and beyond the functions of the product (Hudson and Li, 2018). Brands:

> 'identify the goods or service of either one seller or a group of sellers and to differentiate those goods and services from those of competitors' (Aaker 1991: 7).

Brands can be approached from two viewpoints. Firstly, the *product plus approach* views the brand as an addition to the product (along with say, price) and concerned with communication and differentiation. Secondly, the *holistic approach* views the brand as greater than the sum of its parts such that brands reside in the minds of consumers. It is this second approach, which is most common in destination marketing.

Destination brands signify identity, assure quality, reduce the consumers' need for search and aid in product differentiation. Nonetheless, whilst it may appear that brands are fabricated, they are real entities, based upon products, resistant to change and dependent upon occupying defensible niches within product categories. Developing and managing destination brands is therefore as much a strategic operation as it is tactical as contemporary branding demands deployment of the whole range of marketing tool and not simply promotion (Hudson and Li, 2018; UNWTO 2009).

Blain et al. (2005) define the process of destination branding as:

> 'The set of marketing activities that (1) support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) service to consolidate and reinforce the emotional connection between the visitor and the destination; and that (4) reduce consumer search costs and perceived risk. Collectively, these activities serve to create a destination image that positively influences consumer destination choice' (p. 337).

According to Hankinson (2004) destination brands:

- ⇒ Communicate identity and are therefore of strategic importance;
- ⇒ Are perceptual entities in themselves and so the issue of destination image is central to destination branding;
- ⇒ Enhance value; and
- ⇒ Can be used to build relationships with visitors and/or suppliers

Brands are created by consumers, but at the same time, brands fast track the information processing of consumers by acting as a means of differentiation and a guarantee of quality. However, here consumer's needs for, uses of, perceptions and expectations of and communication about brands is changing rapidly, prompted by social media, digital communication and changing values and lifestyles. Therefore, to be successful a destination brand must be:

- ⇒ Be credible;
- ⇒ Be deliverable;
- ⇒ Be differentiated;
- ⇒ Convey powerful ideas;
- ⇒ Enthuse destination partners; and
- ⇒ Resonate with the visitor

Formulating the destination brand is complex for destinations because the destination comprises many stakeholders, including local residents, and the branding process must be inclusive of these groups, as discussed elsewhere in this report (Heeley, 2015). Destination branding therefore serves two masters:

1. *The local community* where resident acceptance is a major element of destination branding; and
2. *The tourist* who in turn receives information and market stories about the destination from a variety of sources, including social media. When they visit they interact with destination products and services and evaluate the brand.

This raises the question of whether destination-marketing organizations can in fact control the brand to the same degree that marketers act as the custodian of fast moving consumer goods (FMCG) brands. In other words, can all the actions that affect visitor perceptions at a destination be managed and coordinated when many dimensions of destination brands are beyond the control of the marketer? This has been clearly demonstrated in the period since '911' with the many terrorist attacks on destinations.

Designing the destination brand

The destination brand enhances the favourability, strength and uniqueness of the destination and so must demonstrate consistency and clarity of design. Designing the destination brand delivers the blueprint for the branding, development and marketing of the destination. This includes:

- ⇒ Positioning;
- ⇒ Product formulation and composition (such as seaside, city or heritage destinations);
- ⇒ The nesting of the brand in terms of identifying a supra-brand (such as Australia) and sub-brands based on geography and products (Queensland, Gold Coast); and
- ⇒ The communication strategy reflected in destination logos, insignia, and marketing collateral advertising concepts

This can be seen as a five-step approach:

1. **Brand assessment:** This begins with an assessment of the current situation of the destination brand including a review of the marketplace, visitors, stakeholders, influencers, competitors and industry conditions as well as the demographic and social setting of the destination. It will be based on facts and research on visitor perceptions, influencers and stakeholders. The stages will include:
   - ⇒ A review of all previous research.
   - ⇒ A review of all brand communications and marketing plans.
   - ⇒ Analysis of data on competitors and visitor research

2. **Brand promise:** The brand promise is the essence of the commitment to visitors and the benefits (emotional and functional) that visitors can expect throughout the destination experience. The entire destination must commit to the brand if the promise is to be delivered, hence the need for the branding process to be inclusive of all stakeholders, including local residents. The promise is normally expressed in a few sentences to communicate brand attributes:
   - ⇒ Something will be done

- ⇒ An expressed assurance
- ⇒ A perception of future excellence and achievement

All destination brand communication is then consistent with the promise. However, it must be recognised that the destination brand promise will often reflect a compromise between the aspirations of the destination brand and the reality of what the brand can deliver to visitors (Morgan et al., 2003; Ruzzier and Chernatony, 2013; Blain et al, 2005; Hudson and Ritchie, 2009; Knapp and Sherwin, 2005; Malik and Sudhakar, 2014; Ritchie and Crouch, 2003).

3. **Brand architecture:** The architecture of the brand outlines the various messages to communicate the promise and the essence of the destination brand. This process attempts to signal the destination's values and positioning and increasingly tends to stress more emotional than functional benefits. The process also signals what the destination can deliver using a five-stage approach:

    1) Choice of a destination brand name that resonates with the visitor and sets the tone of the destination (an example here would be 'Malaysia, truly Asia).
    2) Graphics such as logos or visual symbols (The most notable being the iconic I love New York).
    3) A by-line that describes what the destination brand is all about (What happens in Vegas, Stays in Vegas).
    4) A tag line that is a phrase to clarify the destination's emotional and functional benefits (for example the way New Zealand communicates its natural values).
    5) The brand story, which is used to inspire visitors and explains how the brand came about (Taiwan has done this very well).

In other words, brand architecture provides a framework within which to communicate the destination brand. It often utilises events or theming (linking to TV, seasons, history, film or literature) (Brodie et al., 2013; MillwardBrown, 2009; Sparkloft Media, 2011).

4. **Internalising the brand:** This is the road map for how the destination organization delivers the brand promise on the ground at the destination through influencing and training employees, partners, stakeholders and residents. This enables and empowers the delivery of the brand promise at the destination. This is critical as the products delivered at the destination are often the strongest manifestation of brand identity. Brand internalisation comprises four stages:
    - ⇒ Creation of brand principles
    - ⇒ Establishment of brand equity goals (Gartner, 2014; 2018)
    - ⇒ Outlining and communicating the brand plan to all stakeholders
    - ⇒ Completing a culturalization plan for all stakeholders

5. **Monitoring:** Finally, the brand building process should end with an evaluation of the brand's effectiveness or performance (Blain et al., 2005; Ritchie and Ritchie, 1998; Sirianni et al., 2013). A constant monitoring of marketing communications efforts is critical, and brand managers must be willing to embrace change if the campaign is not performing well. But not all destinations follow this structured approach to building a destination brand. Often logos and promotional materials are developed without conducting research or pursuing a defined strategy (Zenker and Martin, 2003), and

many do not employ sophisticated evaluation methods to measure the success of their efforts (Faulkner, 1997).

The destination branding process therefore delivers a carefully crafted and conceptualised brand that encompasses the entire destination experience reflecting visitor needs and being inclusive of destination stakeholders (Hudson, 2018). Destinations are places where visitors have experiences, therefore brands have to capture visitor imagination and resonate with the market, whilst also being sensitive to, and inclusive of, the local community and destination stakeholders (Garcia et al, 2012). In addition, brands increasingly assist in encouraging inward investment, talent and economic development and for successful destination they create a halo effect, lifting property process and encouraging in migration (Hudson and Li, 2018).

Destination and Place Branding

There has been a recent 'blurring' of destination branding and place branding (Hudson, 2018) as an increasing number of locations have embraced the concept of place branding (Acharya and Rahman, 2016; Anholt 2010; Allen, 2007; Kavaratzis, 2005; Kavaratzis and Hatch, 2013). Here destinations brand themselves not just to attract tourists, but also to attract investments and talented foreign workers (Ooi, 2008).

Compared to destination marketing, place branding requires a broad set of efforts made by governments and multiple stakeholders such as local residents and more industry disciplines and businesses (Aitken and Campelo, 2011; Hudson, et al, 2016; Klijn et al, 2012; Kotsi et al., 2016; Martínez, 2016; Papadopoulos, 2004).

In a study of tourism campaigns in nine states of the U.S., the research firm of Longwoods International demonstrated how each destination's marketing campaign created a 'halo effect,' lifting not only the number of visitors, but also driving business development, real estate sales, purchase of second homes and even college recruitment (Zimmermann, 2015).

1.4. DESTINATION MARKETING FUNDING

The funding of destination marketing is a critical issue for DMOs. This is because DMOs cannot earn sufficient revenue from supplementary products such as advertising and booking fees. DMOs therefore are very dependent upon government funding, leaving them at the whim of local politics. For example, in the UK many regional tourism boards had their funding cut as part of public sector austerity measures imposed by the British Conservative Government. This means that the long-term funding certainty that is needed for effective destination marketing is absent, particularly in times of economic uncertainly or recession when tourism is not seen as a government priority. Indeed, with government in many countries reducing funding for DMOs, the search for alternative funding is important, as noted below (Pike, 2004)

The Funding Mix

There is no obvious formula for determining the appropriate level of funding for destination marketing as it will depend upon a number of factors including (Pike, 2016):

- ⇒ Host population size;
- ⇒ The number of commercial accommodation beds/rooms;

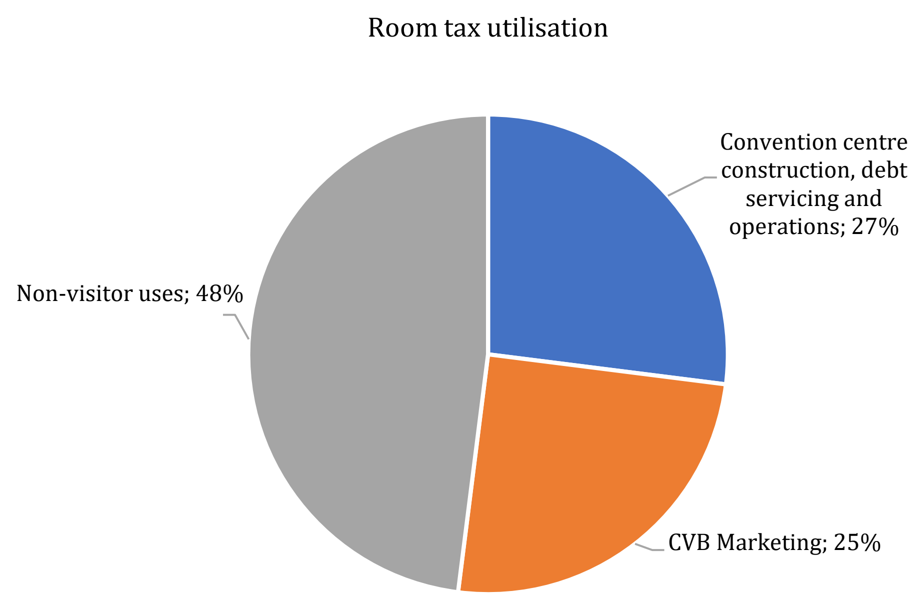
- ⇒ The number of taxpayers/ratepayers;
- ⇒ Visitor numbers and spending;
- ⇒ Local politics and community acceptance of tourism;
- ⇒ Destination lifecycle stage and industry maturity including economic size and importance of tourism relative to other industries; and
- ⇒ The lobbying power of stakeholders

For example, in 2015 the London Tourist Board mix of funding sources was as follows:

- ⇒ £1.85 million from central government;
- ⇒ £241,000 from local government; and
- ⇒ £4 million from the private sector through subscriptions, partnership marketing and sponsorships

Destination marketing is labour-intensive and this leaves DMOs with a high level of fixed costs. A key budgetary issue for DMOs is therefore getting a balance between the fixed costs of operation and spending on promotion. Pike (2016) states that for large national DMOs with budgets of between US$20 million and US$50 million, the average was 64 per cent. In the USA the IACVB estimated that the usage of all room taxes collected was as follows:

Figure 5 - Allocation of room taxes in USA



Source: IACVB

McKercher and Ritchie's (1997) study of local government tourism units in New South Wales and Victoria, Australia found a median operating budget of AUD$215,000, with over half of average budgets were allocated to staffing, with the median marketing allocation being only AUD$70,000.

Funding Options

In terms of funding destination marketing there are a number of options (Pike, 2016):

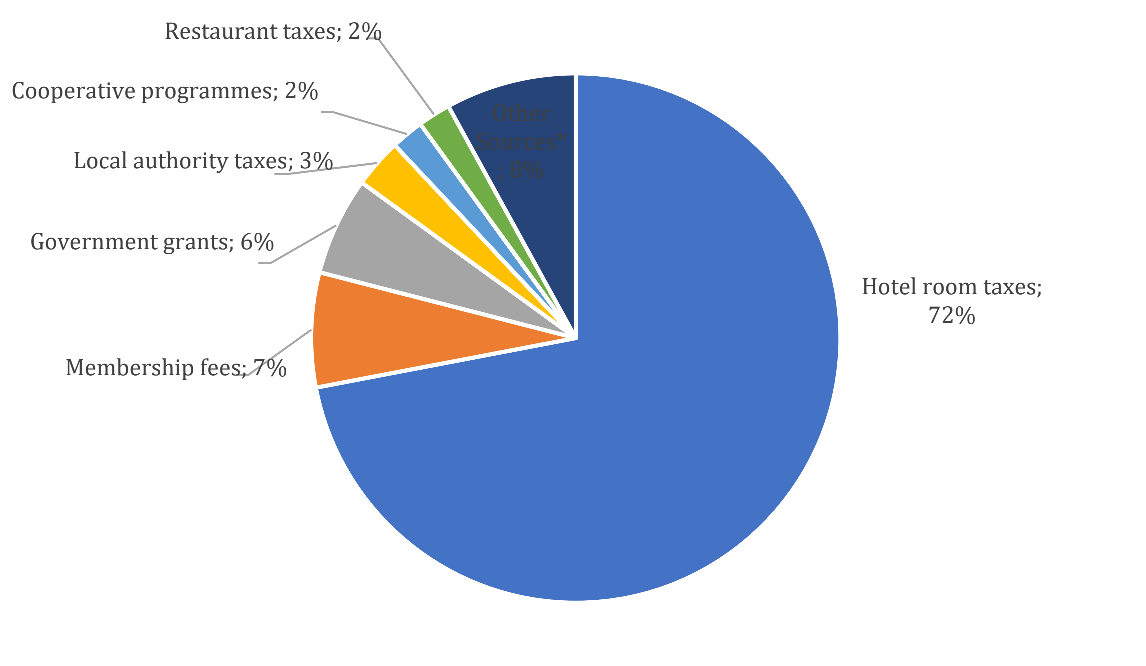
The User-pays Approach

The user-pays approach is where destination stakeholders pay for DMO marketing services. However, tourism would rarely be regarded as an essential government service such as health or education. However, as Pike (2016) notes the case for government involvement in tourism may be made through the arguments that there would be a risk of market failure if responsibility for destination marketing was solely the responsibility of the private sector and the free market, protection of destination resources is required to maintain an attractive environment and tourism presents socio-cultural benefits for communities.

Accommodation Tax

An accommodation tax has the benefit of directly targeting visitors. Accommodation taxes and can generate large amounts of revenue for a relatively low cost and move the cost of destination marketing away from the local community. In the US, the IACVB found the average city hotel tax was 11.6 per cent, with an average of 56 per cent of the tax collected dedicated to funding the CVB (http://www.iacvb.org). Sheehan and Ritchie's (1997) survey of USA CVBs found the following sources of revenue for CVBs with accommodation tax by far the highest:

Figure 6 - CVB Sources of revenue, USA



*Other Sources include: convention centre grants, merchandising, advertising sales, county tax, events, admissions, in-kind services and a provincial or state tax.

Source: Sheehan & Ritchie, 1997

However, accommodation taxes have their critics, as it is seen to only target one sector of tourism. Criticism has also grown in era of the sharing economy with operators such as Airbnb. In addition, these taxes are seen as an additional cost on doing business. Alternatives include a tiered accommodation tax by season or a more general goods and services tax. Of course, the tax revenue is directly proportional to the success of the destination, although of course, tax revenue suffers in a period of declining visitation. For example, Pike (2016) observes that in Las Vegas, a 10 per cent decrease in visitors following 9/11 resulted in a similar decrease in the CVB's US$250 million annual budget and Hawaii's tax revenue has been impacted by the 2018 volcanic eruption.

Tax on Business

A tax on business represents a tax on local businesses, based on either turnover or capital value. Pike (2016) notes that this can be used as an effective means of raising revenue for destination marketing and an alternative to funding from the general household tax or rates base. However, to introduce such a tax is challenging politically, particularly persuading businesses who do not receive tourism spending directly. The tax on business works best in small destinations where tourism is the dominant economic sector (e.g. Queenstown, New Zealand; Monaco) where all businesses are levied. Of course, as with the accommodation tax, the tax base is reduced in periods of lower visitation.

Member Subscriptions

Member subscriptions are an increasingly common form of funding for destination marketing as government funding is squeezed. Fees can be tiered according to size of business but does not remove the problem of 'free riding' by businesses who choose not to be members. Membership levels will depend upon ability to pay, perception of who is in the tourism industry and perceived benefits of destination marketing. Whilst a common method, the total of a DMO's actual budget that is raised from memberships can be quite low - the IACVB found that while half of their members received membership subscription fees this only represented 5 per cent of their budgets. Pike (2016) notes that the Hawaii Visitors Bureau (HVB), which has one of the longest histories of private membership, has offered a range of incentives to financial members including: monthly newsletters, HVB posters and brochures, reduced fees for HVB meetings, participation in trade promotion and cooperative advertising, listings in information guides and a copy of the annual report. In its early years the organisation received more in private sector contributions than from government.

Donnelly and Vaske (1997) classified membership scheme into two types:

1. *Instrumental incentives* are those public goods, such as promotion of the destination, which are obtained by both members and non-members.
2. *Expressive incentives* are resultant benefits that will only be obtained by membership, such as access to a database of consumers who have requested tourism information from the DMO. Expressive incentives remove the problem of 'free riding' by non-members.

Commercial Activities

Commercial activities involve creating income streams from a DMO's own activities to fund destination marketing. Pike (2016) notes that in the USA most CVBs have been structured as non-profit associations, qualifying for tax-exempt status. These organisations promote the business interests of their members but are not permitted to engage in regular profit making business activities. Commercial activities can include:

- ⇒ Licensing the destination brand for merchandise (Virginia is for Lovers).
- ⇒ Alliances with non-traditional partners. New York City and Company has partnered with American Express, Coca-Cola and the National Football League to leverage budgets;
- ⇒ Commissions from member hotels for bookings; and
- ⇒ Visitor information centre sales of merchandise.

Cooperative and Joint Venture Destination Marketing Campaigns

Cooperative and joint venture destination marketing campaigns can be managed by the DMO to demonstrate to government, the level of industry contributions. Here, government funding is seen as a 'seed corn' to attract private sector contributions. These campaigns include sales missions, travel exhibition, media advertising and visiting media programmes jointly financed by both the DMO and the private sector. However, this type of private-sector sponsorship can be successful in the short-term but does not represent a secure vehicle for the longer-term funding of destinations.

1.5. CROSS CUTTING ISSUES

Technology in Destination Marketing

The Internet has revolutionised destination marketing, branding and image formation (Cooper, 2016). At a stroke it has given small destinations with tiny budgets the same market reach as the largest destinations in the world (UNWTO 2008). To quote Wymbs (2011, p.93) 'the rapidly emerging digital economy is challenging the relevance of existing marketing practises, and a radical redesign of the marketing curriculum consistent with the emerging student and business needs of the 21st century is required'.

As a result, technology has created a whole new marketing industry - e-marketing, which can be defined as the promotion of a tourism product, company service or web site on-line and can include a variety of activities from on-line advertising to search engine optimisation. It is also provides a medium and delivery mechanism for consumers to gather information and to make purchasing decisions.

E-marketing is ideally suited to tourism. It allows the development of on-line brochures that can deliver rich multimedia content, blending text, images, sound and video into multimedia documents to overcome the intangible nature of the product. Through video, interactivity and innovations such as virtual and augmented reality, it delivers the ability to 'test drive' the product. It also gives tourism organizations the ability to instantly change dates, prices and availability on-line so saving expensive brochure reprints. Technology also allows organizations to individually target customers through 'narrow casting' to customise messages, utilise email and web links to engage in 'viral marketing' and of course, the Internet gives small businesses and destinations a degree of global market reach previously unheard of. The influence of technology is clear - the decision to visit a destination is increasingly influenced by:

1) The quality of a destination web site and the degree that it allows interaction and flexibility (Park and Gretzel 2007);
2) Internet search engines which are a valuable tool connecting the traveller with destination organisations (Pan et al. 2010);
3) Design of a flexible web presence that incorporates social media and the ability to interact with visitors and potential visitors (Milano 2011; Hays et, 2013); and
4) The presentation of the destination on social media by both the DMO and tourists. The power of tourist's posts on social media are an increasingly powerful influence upon the decision to visit.
5) Social media play a particularly central role in tourism. Due to these characteristics of tourism, tourists have always heavily relied on personal sources of information (i.e., word-of-mouth) to make or at least inform their decisions. Social media enable electronic word-of-mouth (eWOM), which is different from traditional word-of-mouth in that it is asynchronous, many-to-many and not limited to one's personal social circle.

Destination marketing organizations (DMOs) use technology to:

- ⇒ Provide destination information to travellers, saving on print and distribution costs, yet providing content of great depth and visual quality; and
- ⇒ Communicate and interact with customers through email and social media and co-create the brand.
- ⇒ Communicate with stakeholders via portals and intranets to deliver market information and alerts.
- ⇒ Improve the visitor experience through the use of the 'Internet of Things' whereby 'smart destinations' embed receptors in the destination and tourists respond and interact using their social media devices such as smart phones and tablets. The uses here range from simple tourism information to rich interpretation of the features of the destination

Yet, whilst the Internet has been available for destination marketing since the mid-1990s, many destinations have been slow to take advantage of the cost savings and potential that it provides, and it is a common criticism that content provision by destinations lags behind the technology available to deliver it.

Destination Web Sites

DMOs now use the Internet as a central part of their marketing strategy. Here the key is to have a strategic e-marketing plan to direct traffic to a destination web site and to then capture the visitor (UNWTO 2005). Such web sites service visitors, local industry, media and professionals. The structure of a destination web site will depend upon two sets of factors (Cooper, 2016):

1) *Destination factors* – destination size, the variety of destination products, the number of web updates required, and the role of e-commerce on the site.
2) *Technical factors* – the importance of position on search engines, links to social media, whether the site is on a hosted or a purchased server, and the screen resolution required.

Increasingly destination web sites are being used for more than the straightforward delivery and presentation of destination information. Many sites now include the ability to customise the site and for tourists to interact with the information and become involved through social media. As destination web sites have evolved, their levels of flexibility and interactivity have improved and grown.

Good web site design encourages the building of relationships between the destination and the tourist and leads to 'e-satisfaction' on behalf of the traveller. Contemporary destinations achieve this by the development of a web-based interface, or destination portal, which can deliver tangible benefits to both the supplier and the tourist (see below). Effectively, destination portals become the digital version of the destination, unifying web access to the destination, integrating all aspects of the value chain, integrating social media and allowing communication amongst stakeholders. The UNWTO (2001) has identified the following key features of destination web site design:

- ⇒ Accessibility and readability – does the site reach all potential users;
- ⇒ Identity and trust – trust on the Internet is fragile, especially if e-commerce is involved through online booking. Strong branding, use of logos and a clear statement of purpose all help here;
- ⇒ Degree of customisation, interactivity and integration with social media;
- ⇒ Ease of navigation;
- ⇒ Findability and search engine optimisation;
- ⇒ Technical performance – lack of functionality is frustrating for users; and
- ⇒ The quality of the services offered via the web site:
  - Promotion;
  - Information; and
  - Transactions.

DMOs must evaluate their web sites given their levels of investment in web site development, and their critical dependence upon web sites in destination marketing strategies. Whilst this is still a relatively new science, there is a variety of approaches to web site evaluation (Law et al. 2010). These include:

- ⇒ Best practice-based evaluations and measurements that use experts based on a set of quality criteria;
- ⇒ Online surveys that evaluate the needs, satisfaction and opinions of users;
- ⇒ Web analytics which track and trace user behaviour; and
- ⇒ Online experiments and laboratory testing of behaviour where visitors to sites are analysed and their behaviour in say, searching is used to devise online market segmentation approaches

Destination Portals

On the supply side, destination portals allow the integration of destination management systems to draw together all elements of supply at the destination. They allow the identification of high quality content providers at the destination and can manage them by grouping, categorizing, and providing simplified navigation and straightforward accessibility. Portals also have the advantage of acting to encourage virtual destination communities and cooperation amongst stakeholders.

On the demand side, portals act as an interface with the consumer and have the ability to include e-commerce functions through integrated computerised information reservation management systems. These functions are achieved by the presence of both a customer database and a product database with an interface between the two.

Social Media

Technology has also empowered the consumer. Social media and the Internet have revolutionised information search for products and increasingly appear in search engines (Xiang and Gretzel, 2010). Technology and the Internet have fundamentally altered the way destinations interact and communicate with travellers. Traditional approaches to branding that put emphasis on mass media techniques are less and less effective in a marketplace where customers have access to massive amounts of information about brands, and in which social networks have, in some cases, supplanted brand networks (Keller, 2009).

Social media platforms have emerged as a dominant digital communications channel. Bughin (2015) found that the impact of social media on buying decisions is greater than previously estimated and growing fast, with 50 to 60 per cent of customers looking to social media recommendations for products like travel. Destinations are increasingly leveraging social media to promote their brands (Hays, Page and Buhalis 2013), and smart destinations are using social media to build and co-create a destination brand (Larsen, 2014; Lim, Chung and Weaver, 2012. Oliveira and Panyik (2016) suggest that travellers can act as co-creators of brands, given their role as opinion makers with access to a plethora of information communication technologies. This means that destinations should engage them and strategically integrate the content they create into the destination branding effort.

The growth and adoption of social media in particular by consumers has led to the concept of Social CRM (Customer Relationship Management), defined by Greenberg as: 'a philosophy and a business strategy, supported by a technology platform, business rules, workflow, processes and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment. It's the company's programmatic response to the customer's control of the conversation' (2010: 34).

Mobile Devices

The use of mobile devices is revolutionizing the way that tourists consume travel content. Based on Google Analytics data relating to US travel in 2016, 60% of destination searches were on a mobile and two thirds of the time spent watching travel videos happens on mobiles (Alford, 2018). Interestingly, as part of their customer research in the US in 2015 'Travelers' Road to Decision', Google found that 51% start holiday planning with a blank page and no specific destination in mind. This provides an opportunity for destinations to influence consumers at an early stage. The Internet has intensified travel search behaviour with each travel booking now influenced on average by over 19 digital touch points, over 9.2 online research sessions. Google plays a powerful role in this digital landscape with 40% of travellers initiating destinations research on Google (Alford, 2018).

In conclusion, the implications for destination marketing are significant. In the emerging digital economy, the destination marketer will have to be part strategist, part teacher and part technologist (Alford, 2018). The prevailing marketing landscape has taken a dynamic shift, requiring marketers to handle and analyse large volumes of data and spend more on IT than the chief information officer (Pomirleanu, Schibrowsky, Peltier and Nill, 2013).

Market Research for Destination Marketing

Destinations increasingly need to adapt to the changing needs, wants and drives of the market in the form of changing tourist preferences (Tkaczynski et al. 2006). The 'new visitor' is seeking more individualized experiences and tailored forms of authenticity, is relying more on social media and is resistant to traditional forms of marketing (Gretzel, 2018). These same consumers are, however, integral to creating their own tourist experiences with their opinions, images and uploads on social media and instrumental in both shaping future patterns of behaviour and co-creating destination brands.

Accurate and timely tourism data are essential to help understand this changing visitor and for destination marketing decisions (Cooper, 2016). Here, a tourism marketing information system - or knowledge management approach - is a vital, yet unusual, step in the development of most tourism DMOs (Cooper, 2006). This involves assessing information needs, and then developing and seeking that information to both underpin decisions and to meet strategic priorities (Cooper, 2006). There is a variety of sources of market information available to the destination marketer including:

- ⇒ Internal records such as guest histories, comment cards, or staff debriefs.
- ⇒ External sources of market intelligence such as competitor information. In tourism, much information on competitors and the composition of their products is readily and easily available through brochures and Internet sites. Increasingly, because of the explosion of information, tourism organizations are placing more emphasis on market intelligence, often from secondary sources, rather than engaging in the expensive exercise of primary data collection.
- ⇒ Information and trends gleaned from social media as outlined in this report.
- ⇒ Information and trends from tourists' digital traces. These include the social media sources noted above as well as growing use of technologies that track tourists, movements and behaviour

Combined, these sources amount to a huge array of rich and meaningful data available to the destination marketer. Deep and meaningful research is the key to understanding the contemporary tourism consumer and their needs in tourism; it informs the marketer on when and how to intervene in the destination purchasing decision process and also guides them in the co-creation of their destination brands (ESOMAR, 1995).

There is a variety of future trends evident in destination marketing research, the first being the need for a deeper understanding of the contemporary tourist. Here Horner and Swarbrooke (2016) and the Marketing Science Institute (2017) recommend a clear research agenda to understand consumer behaviour. They say that research should:

1) Focus on tourism purchase decisions, rethinking the journey to purchase now that technology is so pervasive in the process, for example, asking where consumption starts – is it web browsing?
2) Focus on perceptions of destinations;
3) Improve the use of qualitative research and new techniques using mobile devices and social media to capture rich tracking data;
4) Understand tourists' perception of quality and their satisfaction with tourism experiences;
5) Develop longitudinal research to allow temporal comparisons;
6) Ensure that market segmentation techniques are research-led;
7) Research tourists' evaluation of competing products;
8) Research reasons for non-purchase - difficult and rarely done in tourism;
9) Research cultural and geographical differences in tourism behaviour; and
10) Explore the linkages between tourism consumer-behaviour models and those in other sectors of the economy.

Data Analytics and Understanding the Visitor in Destination Marketing

Technology plays a significant role in the new wave of market research approaches which help to understand changing visitor behaviour and needs. The Marketing Science Institute's research priorities for 2016-18 can help to inform a future-focused agenda for understanding the new visitor (Alford, 2018) (see Table 5). They reveal the importance of data and analytics for future destination marketing research. Their first priority is, "Quantitative models to understand causality, levers, and influence in a complex world", and the topics recommended for research include: "improving multi-touch attribution, marketing mix, and ROI models — across all media, digital and non-digital", and "Understanding "omni-screen" and "omni-channel" drivers of customer decision making and behaviour" (Table 5). There is a danger that destination marketing lags behind this trend.

These developments represent a move away from traditional market research and data for destination marketing and show the challenges involved in new approaches to the collection and analysis of social media and its relationship with Big Data as detailed below (Cooper and Hall, 2018). Social media provide a rich source of data for destination market research as they are prolific, accessible and highly visible. No longer does the researcher have to question the consumer in the high street or in their home; instead the consumer is constantly posting their thoughts and opinions on-line and whilst the social media companies own the data, they can be accessed through research companies as well as through some sites (such as Facebook) who provide free monitoring tools.

Traditional market research can be costly and time-intensive; as a result, many destinations have begun to turn to social media as a cost-effective and in-depth tool for gaining real time insights into their customers, market, brand appearance and other important market research aspects, assisted by social media aggregation tools such as hootsuite.com. The keys to utilizing social media for market research are to understand the benefits and to create a proper research plan. This flow of information available from social media has been termed 'big data' and for tourism organisations the approach is to:

- ⇒ Extract big data using mining tools by 'scraping' the web site;
- ⇒ Model and analyse the data distinguishing the 'signal' from the 'noise'. This represents a move away from the 'collection' of data' to the development of sophisticated 'analytical approaches to 'understanding' the data'; and
- ⇒ Use knowledge management to communicate the findings, often in the form of a 'dashboard'

This new approach to research is already gaining a commercial edge with the sale and analysis of real time social media data. Companies such as 'DataSift' and 'Gnip' analyse Tweets and blogs to track opinions of products in real time, whilst other research companies such as 'klout' analyse the influence of those who post opinions on line. These companies are 'data platforms', collecting and standardising information from social media sites such as Twitter, Facebook, YouTube and others. The companies can do this by enforcing the licensing rules for social media which state that say, a tweet can be 'analysed' but not 'republished'. The sophistication of the approach allows data from different companies to be combined to create powerful analytics. This is a new departure for market research and one that has moved rapidly from a cottage industry to the mainstream as the sophistication of the technology has improved (Cooper, 2016).

There are two clear advantages for destination marketing research:

- ⇒ Firstly, traditional market research takes months to design and implement but with social media, research can be conducted in a matter of minutes or hours and can be done more cost effectively. This is a significant breakthrough for an industry such as tourism where the product is 'produced where it is consumed' as it allows companies to respond quickly to market intelligence about say, levels of service in a restaurant.
- ⇒ Secondly, big data gives access to market research with an audience sample that is much greater in size than any other source can provide. This type of research also engages with the research subject and can be used to build relationships, as well as ensuring the data is more accurate than in traditional research approaches

There are some key issues here for destination marketing:

- ⇒ Firstly, the problem with social media marketing is measuring the return on investment and its impact on the bottom line.
- ⇒ Secondly, mining all the data created by social media is a challenge for destination marketers in the digital era. Destinations now have access to a massive range of data and have the means to paint detailed pictures of consumers that will drive marketing initiatives to engage them deeply. Yet few of them truly maximize the potential of the data at their disposal (Carey et al, 2012).
- ⇒ Thirdly, the data is collected and owned by a few large private companies such as Twitter and the data is purely used for commercial purposes. In addition, these companies do not simply analyse a social media post but will also know everything about the poster from their information on their profile page. There is a danger therefore that the posts become less revealing as on-line users become more cautious. The recent Facebook revelations about their use of data and privacy settings is salutary here.

⇒ A final issue is the need for sophisticated analysis of the growing use of visual images rather than text on social media posts (Gretzel, 2018)

Destination Marketing Collaboration and Governance

Stakeholders

Destinations comprise of a diverse and eclectic community of individuals, private sector organisations and not-for-profit groups that might or might not actually hold a legitimate interest in the marketing of the destination. Ultimately however, all stakeholders are important, regardless of their level of active interest in tourism, and often present a range of challenges for destination marketers. Therefore, analysis of the management of the network of stakeholder relationships is a critical area for DMOs.

While arguably the most important stakeholder relationship is that between the DMO and both politicians and policy makers who influence funding levels, the issue has not received a lot of attention in the literature (see for example McGehee, Meng and Tepanon 2006). Nonetheless, the role of government as the funding agent for many DMOs makes them a critical stakeholder.

A key issue for destination marketing therefore is to ensure involvement and commitment by all stakeholders in the strategy and branding process. Here DMOs can be seen as the managers of networks of destination stakeholders who each play a critical role in the marketing and branding of a tourism destination. Yet, destination politics are notoriously destructive of the marketing process and it is therefore vital to be inclusive from the outset. Here, Gnoth (2002) extends the concept of the destination brand to that of supply-driven destination brand communities. These provide a platform for connectivity, trust building and decision making at the destination to develop and maintain a sustainable brand strategy amongst all stakeholders.

The key here is to manage the relationship between collaboration and power and to recognise that the views of the local community must be included in destination marketing as destinations are places where people live work and play. Collaboration can be seen to encompass three further issues which are key success factors:

1. **Creation of a shared brand** Creation of a shared brand ensures that the destination brand image is built on shared destination attributes. In other words, there is a need to ‘internalise the destination brand’ and to ensure that its authenticity is shared and believed in by all stakeholders. This allows citizens to be brand champions (but also enemies if they do not subscribe to the brand). DMOs often use leadership figures to communicate and advocate the brand within the destination. A good example of this process has been the development of the Australian ‘Gold Coast’ brand which involved the industry, government and local residents.

2. **Collaboration and inclusiveness** It is essential that the destination brand is the positive outcome of the achievement of unity and collaboration amongst stakeholders; indeed it could be argued that effective destination marketing hinges on relationship building with stakeholders. Yet collaboration across destination stakeholders is a complex and politicised process. Destinations are often crucibles of conflict and stakeholders do not always agree. The danger for branding is that larger stakeholders will take their own brands and brand attributes to market, which damages the smaller

players and the overall destination brand. In other words, support offered by stakeholders makes or breaks the destination marketing process. This is clearly illustrated in the power of intermediaries. The power of travel intermediaries, such as wholesalers and online travel agents can also present a range of challenges for DMOs. Morgan and Pritchard (1998) reported the influence of travel wholesalers and agents who derailed a proposed new brand campaign for Morocco, which had the support of the local tourism community. In Turkey, the influence of European tour wholesalers on negative seasonality impacts have been reported by Okumus and Karamustafa (2005), Pike (2008) and Ozturk and van Niekerk (2014). Thus there can be many sources of tension in DMO decision marketing (see Kelly and Nankervis 2001, Pike 2016, pp. xviii), because of the multiplicity of accountability of the DMO, real and perceived, to government, media, the host community and the travel trade.

3. **Destinations as loosely articulated networks** Collaboration recognises that destination stakeholders are critically dependent upon each other. This involves joint decision-making with individuals and interest groups operating at different levels of the destination. In seeking agreement amongst groups, destination marketing can recognise that destinations are effectively informal flexible networks based on trust and common interest. This can be encouraged through the use of destination portals which draw the community together, combined with training and innovative destination business models to connect and coordinate stakeholders.

Governing Marketing Collaboration

Given the nature of destinations as loosely articulated networks of organisations, many argue that tourist destinations are best managed through a process of collaboration (Scott et al. 2008). This implies a need for organizations operating in a destination to share resources and access to markets in order to achieve an integrated management and delivery system, which in turn should ensure a seamless visitor experience (Fyall and Garrod, 2005; Jamal and Getz, 1995). In this "networked economy", collaboration is necessary to accommodate a challenging external environment and an environment that is inhabited by multiple stakeholders with divergent needs, varying values, and therefore differing demands on scarce resources. As such, collaboration can be viewed as a natural response to the composition of destinations. This is consistent with the views of Manente and Minghetti (2006) and Ritchie and Crouch (2003, p.167), who argue that the 'number of destinations, DMOs and firms that collaborate seems to be in the ascendancy'. Some of the areas on which such collaborative relationships focus within and between destinations include:

⇒ Product development (Caffyn, 2000);
⇒ Product marketing and promotion (Augustyn and Knowles, 2000);
⇒ Visitor management (Selin and Chavez, 1995); and
⇒ Training and employment initiatives (Augustyn and Knowles, 2000)

Progressive and effective DMOs now appreciate the importance of their more broadly based "management" mandate to deal with the network of stakeholders. Here there are three contemporary governance approaches:

1. **The SMART movement** - a contemporary approach to balancing the power of stakeholders in destination marketing where the balance of destination "power" lies

primarily with those that not only hold the information but also direct its flow (Pike 2018). Destination success in a SMART world will thus be attributed to those that are able to successfully facilitate the interplay of people, ICTs and civic leadership: all of this being conducted in a collaborative manner. Not only will such SMART agendas create healthy, sustainable, liveable places that are desirable to visit, but they will also necessitate appropriate technologically-enhanced infrastructure, effective destination operations and services, and social, public policy, planning and governance mechanisms and structures to ensure the longevity and sustainability of "competitive" destinations (Gretzel et al, 2015).

2. **Holistic place management** – an approach that emerged in the light of the challenges experienced in many traditional, and to date mainly European, cultural destinations from overcrowding and the consequent degradation of the quality of life for residents, now termed 'overtourism'. Although with negative effects for tourists with regard to the dilution of the tourist experience caused by the sheer volume of tourists, it is the extent to which local residents in the destinations concerned have started to challenge the unabated growth of tourism that has raised global awareness of the issue. This is now evident in cities as diverse as Dubrovnik, Venice, Vienna, Amsterdam and Barcelona. This trend highlights the need to view destinations in a holistic and inclusive manner and not dissect plans and policies separately for residents and tourists but to bring them together for the greater quality of life experience for all – a 'whole of destination approach'.

3. **Policy networks -** traditionally, the public sector has played a key role in destination marketing and management (Dredge and Jenkins, 2011; Hall 2005). However, in times when neoliberalism is the dominating political ideology, public policy is largely underpinned by corporatist philosophies (Dredge, 2010). As a result, destination marketing and management demands the inclusion of a large number of communities and organizations representing diverse sectors of the economy as already noted (Cooper and Hall, 2018; Timur and Getz, 2008). This has contributed to the rise of policy networks (Dredge and Jenkins 2011; Tyler and Dinan, 2001). Policy networks are policy-driven communities involving a government–industry–community nexus in the development of destinations (Dredge 2006; Pforr 2006; Thompson and Pforr, 2005; Wattanacharoensil and Schuckert, 2014). As such policy networks capture sets of social relationships, both formal and informal, that shape collaborative action between government, industry and the civil society (Howlett and Ramesh, 1995; Rhodes, 1997). Power in the destination network prompts stakeholders to influence tourism policy (Nunkoo and Ramkissoon, 2012), and as such trust in government, plays a key role. As DMOs are expected to evolve and assume more leadership functions to contribute to strategic decision-making, a networked approach is seen as an opportunity to promote and establish more collaborative, transparent and inclusive policy-making (Scott et al., 2008), particularly in light of rapid globalisation, changing roles of government and economic restructuring on a local-to-global scale (Schneider, 2005).

Table 1 - Jain's (1985) Guide to strategic guide options

Competitive Position	**STAGES OF INDUSTRY MATURITY**			
	EMBRYONIC	GROWTH	MATURE	AGING
Dominant	Fast grow Start-up	Fast grow Attain cost leadership Renew Defend position	Defend position Attain cost leadership Renew Fast grow	Defend position Focus Renew Grow with industry
Strong	Start-up Differentiate Fast grow	Fast grow Catch-up Attain cost leadership Differentiate	Attain cost leadership Renew, focus Differentiate Grow with industry	Find niche Hold niche Hang-in Grow with industry Harvest
Favourable	Start-up Differentiate Focus Fast grow	Differentiate, focus Catch-up Grow with industry	Harvest hang-in Find niche, hold niche Renew, turnaround Differentiate, focus Grow with industry	Retrench Turnaround
Tenable	Start-up Grow with industry Focus	Harvest, catch-up Hold niche, hang-in Find niche Turnaround Focus Grow with industry	Harvest Turnaround Find niche Retrench	Divest Retrench
Weak	Find niche Catch-up Grow with industry	Turnaround Retrench	Withdraw Divest	Withdraw

Source Jain (1985)

Table 2 - Characteristics of Destination Lifecycle stages and typical responses

	Introduction	Growth	Maturity	Decline
Characteristics				
Sale	Low	Fast growth	Slow growth	Decline
Profits	Negligible	Peak levels	Declining	Low or zero
Cashflow	Negative	Moderate	High	Low
Customers	Innovative	Mass market	Mass market	Laggards
Competitors	Few	Growing	Many rivals	Declining number
Responses				
Strategic focus	Expand market	Market penetration	Defend share	Productivity
Marketing expenditure	High	High (declining %)	Falling	Low
Marketing emphasis	Product awareness	Brand preference	Brand loyalty	Selective
Distribution	Patchy	Intensive	Intensive	Selective
Price	High	Lower	Lowest	Rising
Product	Basic/unstandardised	Improved/standardised	Differentiated	Rationalised

Source: Doyle (1976), Kotler (1986)

Table 3 - Categories of Destination Marketing Organisations

Category	Definition	Variation of terms	Example
National Tourism Office (NTO)	Officially recognised as responsible for coordinating the destination marketing planning for a nation.	National Tourism Organization National Tourism Administration	Visit England https://www.visitengland.com/biz/home
State Tourism Office (STO)	Officially recognised as responsible for coordinating the destination marketing planning for a state, or province, in a country with a federal political system.	Provincial Tourism Office	Hawaii Visitors and Convention Bureau, USA www.hvcb.org
Regional Tourism Organisation (RTO)	Officially recognised as responsible for coordinating the destination marketing planning for the political boundary of a local regional area such as a city or town.	Regional Tourism Board Convention and Visitors Bureau Regional Tourism Association Regional Tourism Partnership	Northland Inc, New Zealand www.nothlandnz.com
Local Tourism Association (LTA)	Membership based association of tourism related services that coordinates the local destination marketing planning for a district within an RTO catchment.		Flinders Island Tourism Association, Australia www.visitflindersisland.com.au
Macro Region Tourism Organisation (MTO)	A collaborative approach to the promotion of several destinations, either at a local or national level, which supplement rather than replace the activities of individual member DMOs.	Macro Region Marketing Organization Macro Region Marketing Association	Scandinavian Tourism Boards www.goscandinavia.com

Source: Pike, 2018

Table 4 - Steps, Aims and Responsibilities in Data-Driven Segmentation, Targeting and Positioning

Step	Aim	Responsibility
Segmentation		
Secure full institutional support	Involvement and support by senior management in all organisational units.	Management.
Determine the ideal market segment	Agreement within the organisation on which criteria will be used to evaluate segments.	Management.
Collecting data	Have available high-quality, valid, relevant empirical data. This includes both demand side data and those from the private sector such as attractions, accommodation operators and transport companies.	Management. Data analyst.
Exploring data	Insight into the structure of the data to determine nature of the segmentation solution.	Data analyst.
Extracting segments	Grouping consumers into segments.	Data analyst.
Profiling segments	Identifying the key defining characteristics of each segment.	Data analyst.
Describing segments	Providing a rich description of each market segment.	Data analyst.
Targeting		
Evaluating segments	Use the segment evaluation criteria identified earlier to evaluate selected segments.	Management.
Selecting (a) target segment(s)	Based on this evaluation select one or a small number of market segments to target.	Management.
Customizing the product, price, distribution and promotion	Using the profiling and rich descriptive information about the target segment(s) to develop a customized marketing mix.	Management.
Positioning		
Determining the optimal positioning	Using the profiling and rich descriptive information about the target segment(s) to develop a positioning strategy.	Management.
Repositioning	If required, take marketing action to adjust the positioning.	Management.
Monitoring	Monitor on a continuous basis changes in market segments as well as positioning and adapt if necessary.	Management. Data analyst.

Source: Dolnicar, 2018

2. REVIEW OF DESTINATION MARKETING AT OIC MEMBER STATES

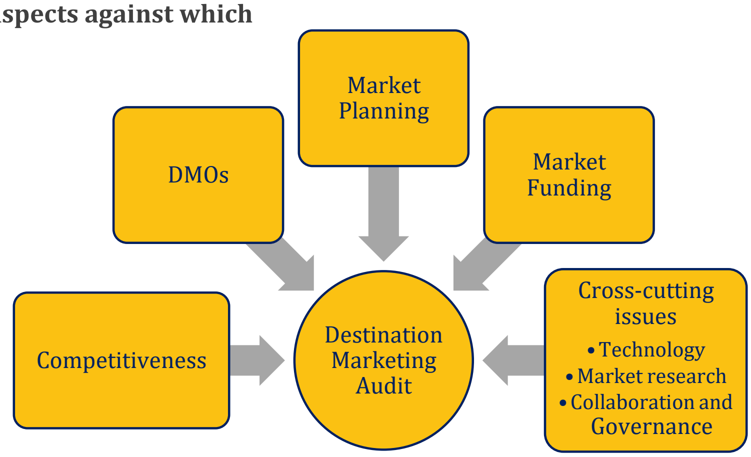
One of the requirements for this report was to review destination marketing at OIC Member States, including the literature for those States and a comparison with destination marketing trends and best practices in the World (e.g. branding, e-marketing, market research, collaborative marketing, funding, legislation, stakeholder motivation and involvement etc.)

Given that there are 57 Member States it would be impractical to review all States so a more pragmatic approach is suggested. The work undertaken in this report identifies best practice in destination marketing and also recognises how such best practices differ depending on the life-cycle stage of the market in question. It uses the examples of Jordan, Malaysia and Senegal to illustrate the approach.

Auditing destination marketing in OIC Member States

Identified in this report are five aspects of destination marketing against which Member States can self-audit:

Figure 7 - Five aspects against which



Each of these aspects has been reviewed in detail, based on best practice globally. This provides a framework against which Member States can compare their status quo in order to create a gap analysis. This would then form the basis for an action plan for the next stage of their respective development in destination marketing as outlined below.

Comparative analysis

The inclusion of the detailed desk-based case-studies and fieldwork studies also facilitates a comparative analysis. Using the analysis presented this report, Member States can identify how their own strategic and tactical plans can be improved to become as effective as those of Canada and Turkey. The case study of the United Kingdom, although it would itself benefit from improved collaboration and funding, also contains some useful approaches that could be adopted.

The analysis of the semi-structured interviews provides comparative data, especially for those Member States that are earlier in their development of destination marketing strategies, so they can review and improve the relevant aspects of their own plans (e.g. in terms of communication, transparency, collaboration and funding).

Self-Audit of Marketing Best Practice

In order to achieve an effective self-audit against destination marketing best practice, a number of steps are involved:

Figure 8 - Self-audit best practice

Step one: Clarify the strategic drivers of the destination's marketing activity. These may include:

a. Increasing visitor numbers, possibly by identified segment;
b. Increasing visitor spend;
c. Decreasing seasonality;
d. Encouraging sustainability;
e. Increasing marketing spend of partners

Step two: Undertake an audit of each strategic driver every twelve months. This audit assesses marketing activities in the respective destination against the best practices identified in this report. The results of this audit are scored on a 1-5 scale (see table 5)

Step three: weight the audit items for importance with weightings varying from one year to the next, depending upon which areas the DMO believes needs particular focus for that year

Step four: Identifies the gaps in marketing practice at the destination and develops a plan to address this

Table 5 - Sample Spreadsheet for each Strategic Driver

Marketing Metric	Score 1-5	Weighted Score	Gaps Identified	Comments
Competitiveness				
Governance				
Collaborative Working				
Funding				
Technology				
Positioning				
Segmentation/Targeting				
Branding				
Product				
Price				
Distribution				
Promotion				
Research				
Performance Monitoring				
Other				

Destination Marketing Examples – Jordan, Malaysia and Senegal

This section of the report takes three country examples, one from each of the three OIC regions:

1. Jordan (Arab Group);
2. Malaysia (Asian Group); and
3. Senegal (African Group)

Each of these destinations is both distinctive and at a different stage of the destination life cycle. They therefore act as useful examples to demonstrate the utility of the self-audit approach.

Destination Marketing in Jordan

Jordan's Marketing Strategy by Destination Life Cycle

Jordan's tourism products are largely at the late growth stage of the destination life cycle. In the late growth stage marketing strategy is about protecting revenues and profit by maintaining product quality, adding new product features or support services to keep up with the competition, and transforming distribution channels to embrace the Internet. Jordan has a long pedigree in destination marketing and its approach is well documented (see Table 8 for a summary of relevant tourism statistics).

Jordan's Tourism Destination Resources and USP

Tourism plays an important role in the Jordanian economy, accounting for 13 per cent of GDP and second only to remittances from the large numbers of Jordanians working abroad. Around four million international arrivals are recorded annually. However, over-reliance on the attractions of East Jerusalem, Bethlehem and Jericho meant that most of Jordan's appeal, as well as its hotel stock, were lost when Israel occupied those territories (the West Bank) in 1967. The government then had to redevelop tourism east of the river Jordan, on a less promising resource base. More recently, Jordan's tourism has suffered severely from the neighbouring wars in Syria and Iraq, and the ongoing uncertainty across much of the region. The major tourism resources include:

- ⇒ Petra – the ancient city of the Nabatean civilization - in a unique setting, concealed in a deep valley. This accounts for a substantial part of Jordan's tourism revenue, and has encouraged hotel development in the area;
- ⇒ The desert scenery of Wadi Rum, where ecotourism is being developed, and which is associated with the exploits of Lawrence of Arabia during the First World War;
- ⇒ The eastern shores of the Dead Sea where spa tourism is being developed;
- ⇒ The Crusader castle at Kerak;
- ⇒ The well-preserved Roman city of Jerash with its annual festival;
- ⇒ Places of particular significance for pilgrims include the site on the east bank of the river Jordan where Christ was baptised, the ruined fortress of Mukawir (where John the Baptist was executed) and Mount Nebo, associated with Moses; and
- ⇒ The beaches and water sports of Aqaba on the Red Sea coast, which has been developed as a rival to Eilat

Destination Marketing in Jordan

The importance of tourism to the Jordanian economy means that the government takes tourism seriously. Destination marketing is spearheaded by the Ministry of Tourism and Antiquities through the Jordan Tourism Board (JTB). The role of the Ministry is to activate the role of the tourism industry to highlight Jordan's attractions and to distinguish Jordan as a unique tourism destination, and in appreciation of the role of tourism to national income by generating foreign exchange earnings, and in recognition of the important role of the private sector in investment and development. The Ministry's Mission focuses on accomplishing a number of strategic objectives, which can be summarized as follows:

- ⇒ First objective - develop an advanced tourism industry capable of utilizing its comparative and competitive advantages through highly developed infrastructure facilities and superstructure services.
- ⇒ Second objective - develop archaeological and tourism sites and resources to enhance the tourism product, extend tourist length of stay achieve higher, tourism revenues and create new job opportunities.
- ⇒ Third objective - expand the role of the private sector in tourism investment and capital attraction within a framework of mutual cooperation between the public and the private sectors.
- ⇒ Fourth objective - upgrade the quality of tourism services to the highest international standards.
- ⇒ Fifth objective - develop tourism awareness of the Kingdom's culture, heritage, civilizations, and archaeological resources within the framework of sustainable tourism development in harmony with local communities and non-governmental organizations.

- ⇒ Sixth objective - strengthen the institutional setup of the tourism sector by upgrading legislation, laws, by-laws, regulations and human resources' development.
- ⇒ Seventh objective - establish and lead marketing and promotion campaigns in international and regional markets, strengthen international cooperation and promote domestic tourism

The Jordan Tourism Board (JTB) was officially launched in 1998 as an independent, public/private sector partnership committed to utilise marketing strategies to brand, position and promote the Jordan tourism product as the destination of choice in international markets. The adopted strategies are tuned to reflect the true image of the Jordan tourism product, being a cultural, natural, religious, adventurous, leisure and MICE destination.

As part of its marketing strategies, the JTB plans and executes an integrated program of international promotional activities. This program includes active participation in trade fairs, trade workshops, trade and consumer road shows, familiarisation trips, press trips, brochure & multimedia production, and media relations. To carry out its goals, the Jordan Tourism Board utilizes the services of eleven offices in Europe and North America.

The mission of the JTB is to lead the branding, promoting and positioning of Jordan as a destination of choice. Its vision is to be a pioneering tourism board achieving organizational excellence to maximize the impact of tourism on the national economy.

Destination Marketing in Jordan

The approach to destination marketing is documented in the Jordan National Tourism Strategy. The strategic vision is that Jordan will be a distinctive destination offering diverse, year-round visitor experiences that will enrich the lives of Jordanians and their guests. The highlights of the strategy from a marketing perspective are:

- ⇒ Reducing the impact of seasonality further by increasing tourist volumes during the shoulder and off-peak months.
- ⇒ Better marketing and promotion of Jordan as a destination through further strengthening of the branding message and utilizing new distribution channels, with a priority on e-marketing, social networking and web-based platforms.
- ⇒ Specifically-targeted programmes of work designed to build great visitor experiences thereby creating a competitive advantage for Jordan

This is delivered by the strategic mission which is to plan and implement the changes and actions necessary to:

- ⇒ Raise the overall competitiveness of Jordan's tourism industry;
- ⇒ Enhance the visitor experience through innovation in product development;
- ⇒ Better position and promote the tourism offering to global markets so as to attract higher yield customers throughout the year;
- ⇒ Create a regulatory and operating environment which drives better business performance; and
- ⇒ Release the full energy of the private sector as the engine of growth

Destination Marketing Strategy

Destination marketing for Jordan is articulated through two strategic pillars

Pillar 1 – Marketing and promotion; and

Pillar 2 – Product development.

Pillar 1 – Marketing and Promotion

Jordan's approach to marketing and promotion has involved expanding the number of overseas Jordan Tourism Board (JTB) offices and will focus on growing international and domestic tourism numbers and revenue and extending visitor length of stay through improved international and domestic marketing.

The three targets of this pillar are as follows:

1. Total arrivals to increase to 9.4 million.
2. Tourism receipts to grow to JD4.2 billion.
3. Domestic tourism receipts to grow by 30% over the period.

Twelve market segments have been identified which present significant opportunities for Jordan. These are:

Cultural heritage (archaeology)	Adventure and activity tourism
Religious tourism	Scientific, academic, volunteer and educational
Eco-tourism	Filming and photography
Health and wellness	Festivals and cultural events
Cruises	Summer and family holidays
Meetings, incentives, conference and events	Sports and recreation

To improve marketing and reach these target markets, the strategic objective for this pillar is to increase arrivals of high-yielding tourists from key current and emerging markets and grow the domestic tourism market. This will be achieved through the following key activities:

- ⇒ Ensure reliable market research is available to guide decision-making.
- ⇒ Secure a sufficient and timely tourism marketing budget for the JTB.
- ⇒ Strengthen the branding of Jordan as a distinctive, world-class destination in key source markets.
- ⇒ Review and enhance all international marketing activities and improve overseas marketing capacity to increase visitor numbers, length of stay and average spend.
- ⇒ Develop marketing campaigns such as 'Experience Jordan' to grow domestic tourism numbers and revenue, especially in key tourism regions and localities.

- ⇒ Introduce specific initiatives to reduce tourism seasonality and achieve greater year-round spread.
- ⇒ Build the skills and capacity of marketing professionals within the tourism industry to maximize their potential to deliver on defined outcomes

As part of the strategy the tourism campaign have focused on historical assets, in contrast to other destinations in the region who are focusing on building new attractions to entice tourists. For example, the US$670,000 ExtraJORDANary in 2015 focused on the plethora of historic attractions, including the UNESCO World Heritage Site of Petra and the Dead Sea. The campaign emphasized the blending of the new with the old, promoting the mix of modern restaurants and hotels within a setting of traditional boutiques and local markets.

Pillar 2 – Product Development

Jordan's destination marketing under Pillar 2 will be aimed at increasing and diversifying tourism products and enhancing the 'Jordan Experience' in order to create a distinctive brand and guarantee visitors a memorable experience. To achieve this, the strategic objective is to provide authentic visitor experiences through rich and engaging products and services. Here niche products are being leveraged by the government as holding strong potential for growth and for helping the country's recovery. This includes film tourism.

The three targets for Pillar 2 are:

1. Air capacity into Jordan increased by 20% over the lifespan of the strategy.
2. 20 new demand-driven tourism infrastructure projects completed.
3. 100% of hotels and 80% of restaurants to be approved and classified.

Jordan's tourism product development approach is intended to:

- ⇒ Ensure sustainability and environmental and archaeological protection
- ⇒ Create clusters of relevant and sufficient core and support products to maximize visitor experience
- ⇒ Ensure the spread of economic and social benefits across the Kingdom via new visitor experiences
- ⇒ Create public-private partnerships for product development and investment; facilitate private sector and community participation in publicly-owned assets
- ⇒ Improve visitor services and conservation at key sites quickly
- ⇒ Transform products to experiences according to visitor requirements
- ⇒ Diversify Jordan's product and service options and establish high quality standards
- ⇒ Create additional nodes and routes of special interest to increase stay and visitor spending

The following activities contribute to achieving the targets for Pillar 2:

Access and Transport

- ⇒ Increase international air access capacity
- ⇒ Improve the quality of the visitor experience at national and regional airports

- ⇒ Improve border-crossing regimes
- ⇒ Develop effective and efficient land transport within the country, including the introduction of well-placed road and location signage

Visitor Experience

- ⇒ Upgrade Jordanian arts and crafts to offer high-quality authentic designs
- ⇒ Improve the quality of tourism information centres and tourist guides

Attractions and Activities

- ⇒ Engage with the private sector to improve the presentation, management and interpretation of cultural resources and key heritage sites
- ⇒ Enhance visitor entertainment experiences at key regional destinations
- ⇒ Revolutionise and promote Jordan's museums as distinguished experiences
- ⇒ Develop the festivals and events product

Food and Accommodation

- ⇒ Implement national and mandatory best practice standards at hotels and restaurants
- ⇒ Develop themed culinary activities and events
- ⇒ Develop tented camps and eco-lodges
- ⇒ Encourage the development of strategically located mid-range hotels, suites and apart-hotels

I addition individual tourist destinations in Jordan are being developed with their own strategies, such as at Aqaba which has its own tourism marketing strategy supported by USAID. This recognizes the 'destination within the destination concept'

To provide information about the products, Jordan has a good network of tourist offices and visitor centres, with the main tourist office in Amman.

Funding

The strategy recognises that for effective campaigns to have the desired effects, appropriate financial resources must be secured from the public and private sectors and invested in regional, international and domestic marketing activities.

Industry Involvement and Coordination

The Ministry agreed that the National Tourism Strategy should be private sector-led with public sector partnership. This recognizes the strength of the sector in Jordan and the government's commitment through assistance to businesses.

A key player is the Jordan Inbound Tourism Operators Association which has the mission to raise the standard of practice in inbound tourism to Jordan. It is raising standards by focusing on three major pillars:

1. The professional conduct of JITOA members with all stakeholders;
2. Acting as a major player in the decision-making process in tourism; and
3. Being the reliable reference for the inbound industry in Jordan.

It achieves this through a series of activities including advocacy for the sector and product development.

Assessment

Jordan has a long record of destination marketing and **its tourism products are largely at the late growth stage of the destination life cycle**. Tourism is an important part of the country's economy, however the loss of territories in 1967 and current uncertainty in the region have impacted on Jordan as a destination. Jordan's destination marketing is headed by government and public/private sector partnership through the JTB and scores highly against international best practice. The adopted strategies are tuned to reflect the true image of the Jordan tourism product, being a cultural, natural, religious, adventurous, leisure and MICE destination.

Destination marketing for Jordan is articulated through two strategic pillars: Pillar 1 – Marketing and promotion; and Pillar 2 – Product development. Its vision is to be a pioneering tourism board achieving organizational excellence to maximize the impact of tourism on the national economy. However, there is scope to improve to develop (i) a joined-up government approach to tourism marketing; (ii) strong efforts to involve other stakeholders in a structured way; and (iii) a better connect sector appears, update the current websites, offer on-line booking platforms and generally strengthen its presence on social media. It is evident that a more sophisticated approach to monitoring and evaluation of marketing programmes would benefit tourism in Jordan.

Table 6 - Key tourism statistics for Jordan

JORDAN	2012	2013	2014	2015	2016	2017
Population (mid-year) (millions)	7.4	8.1	8.8	9.5	9.8	10.1
Direct Employment (000s)	98.4	89.5	96.7	81.4	78.8	80.5
International Tourism Arrivals (Millions)*	4.1	3.9	4.0	3.8	3.8	3.8
International Tourism Receipts (US$m)	5,120	5,140	5,510	4,970	4,940	4,630

Note

* Includes same day visitors

Destination Marketing in Malaysia

Malaysia's Marketing Strategy by Destination Life Cycle

Malaysia's tourism products are largely at the late growth stage of the destination life cycle. In the late growth stage marketing strategy is about protecting revenues and profit by maintaining product quality, adding new product features or support services to keep up with the competition, and transforming distribution channels to embrace the Internet. Malaysia has a long pedigree in destination marketing and its approach is well documented.

Malaysia is one of the OIC's leading tourism destinations (see Table 6 summarizing tourism statistics for Malaysia). The approach to destination marketing is appropriate for a destination in the late growth stage of the destination life cycle.

Malaysia's Tourism Destination Resources and USP

Malaysia is a diverse tourism destination that offers world-class attractions, including nature (the wildlife resources of the interior mountains and rainforests), shopping, adventure, islands and beaches, as well as many international events. Resources include:

- ⇒ A variety of customs, religions, traditions, festivals, heritage, arts and crafts, and cuisines of the Malays, Chinese, Indians, and various ethnic groups.
- ⇒ Malaysia is a major destination for health/medical tourism and MICE events. Facilities for conferences and meetings include the Putra World Trade Centre and the Malaysian International Exhibition Centre in Kuala Lumpur.
- ⇒ In addition, the country has many new developments to facilitate travel, such as the MRT project, which has completed the Sungai Buloh–Kajang phase, offering travellers a user-friendly and convenient gateway into the city and the surrounding suburbs.
- ⇒ Malaysia also has many new and upcoming tourist attractions, such as the Movie Animation Park Studios in Ipoh, premium shopping outlets, international hotel chains, the Desaru Coast development, and the upcoming 20th Century Fox World theme park in the Genting Highlands.
- ⇒ Beach attractions are found in West Malaysia, particularly on the off-shore islands that include Penang, The Langkawi Islands, and Pangkor and its small neighbour, Pangkor Laut that has developed a niche market in spa tourism.
- ⇒ Natural resources include The Taman Negara National Park which attracts growing numbers of eco-tourists and the Batu Caves, a major religious shrine for Hindus. The state of Sabah boasts some of the world's largest limestone caves and Kinabalu, the highest mountain in South-east Asia attracts climbing and trekking expeditions.
- ⇒ Other resources include the old Portuguese trading centre of Melaka, with its colonial heritage; the mountain resort of Genting Highlands, with its ' City of Entertainment', casino, golf course and funicular railway; and agro-tourism on some of the rubber plantations.
- ⇒ Adventure tourism is based on Kuching (Sarawak) and Kota Kinabalu (Sabah)

Destination Marketing Agencies

An Act of Parliament established the Tourist Development Corporation of Malaysia (TDC) in1972 as an agency under the former Ministry of Trade and Industry. With the inception of the

Ministry of Culture, Arts and Tourism in1987, the TDC was moved to this new ministry; and became the Malaysia Tourism Promotion Board (MTPB) through the Malaysia Tourism Promotion Board Act 1992. Popularly known as Tourism Malaysia, its full focus is on promoting Malaysia domestically and internationally. It currently reports to the Ministry of Tourism and Culture.

Tourism Malaysia Vision

"To make the tourism industry a primary source of national revenue and a prime contributor to the socio-economic development of the nation".

Tourism Malaysia Mission

"Marketing Malaysia as a destination of excellence and to make the tourism industry a major contributor to the socio-economic development of the nation".

Tourism Malaysia Objectives

The objectives of Tourism Malaysia are to:

- ⇒ Promote Malaysia as an outstanding tourist destination
- ⇒ Showcase Malaysia's unique wonders, attractions and cultures
- ⇒ Enhance Malaysia's share of the market for meetings, incentives, conventions and exhibitions (MICE)
- ⇒ Increase Malaysia's tourism revenue by increasing tourist numbers to Malaysia and extend their length of stay
- ⇒ Encourage tourism and its related industries in Malaysia
- ⇒ Help develop domestic tourism and promote new investments in the country, as well as provide increased employment opportunities. The growth of tourism will also contribute positively to the country's economic development and quality of life of Malaysians

Tourism Malaysia Functions

The functions of Tourism Malaysia were laid down in the Malaysian Tourism Promotion Board Act, 1992. They are as follows:

- ⇒ Stimulate and promote tourism to and within Malaysia;
- ⇒ Invigorate, develop and market Malaysia as a tourist focal point;
- ⇒ Coordinate all marketing activities relating to tourism conducted by any organisation; and
- ⇒ Recommend to the Minister relevant measures and programmes that stimulate the development and promotion of the Malaysian tourism industry

These functions are achieved through the following priorities:

- ⇒ Increase international tourism arrivals;
- ⇒ Extend the average length of stay of visitors to increase tourism revenue;
- ⇒ Stimulate the growth of domestic tourism; and

⇒ Increase the benefits/share obtained from the MICE market.

Tourism Malaysia Marketing Strategy

Tourism Malaysia's strategy focuses on six key strategic directions:

1. Optimise the use of the latest information technology;
2. Leverage on upcoming major events;
3. Synergise with the development of mega projects;
4. Enhance initiatives under the national key economic area;
5. Maximise integrated marketing campaigns; and
6. Promote Malaysia as a filming destination.

In terms of leisure tourism, the strategy identifies new areas of product opportunities including culture, arts, heritage, and crafts, as well as niche sectors such as shopping, birding, golfing, cruise, diving, angling, yachting, bike tourism, wedding/honeymoon, and homestay. In terms of business tourism Malaysia has emerged as one of the region's top business destinations, hosting accredited MICE events.

Tourism Malaysia Market Segments

Tourism Malaysia has carefully segmented the tourism market and developed approaches for each segment. They are as follows:

International markets

Inbound arrivals to Malaysia witnessed strong growth in 2017, partly due to the weak ringgit. Tourism Malaysia organises and participates in numerous promotional programmes through its 35 overseas offices and eight marketing offices. These international tourism promotions activities comprise of sales missions and roadshows, tourism exhibitions and expositions, seminars and workshops, advertising campaigns, publicity programmes, mega familiarisation trips as well as the promotion of niche products.

Short Haul – short haul segments of travellers include family, business travellers, millennials, students, and Ibu Arisan (Indonesia).

Medium Haul – medium haul segments of travellers include family, business travellers, honeymooners, Muslim millennials, dual income no kinds, single income no kids and retirees. Geographically the focus is on China, India, Japan, Korea, and Taiwan.

The potential attractions for tourists from these two market segments include shopping, theme parks, nature, islands and beaches, food, culture, health and wellness, honeymoon, as well as Muslim-friendly destinations and incentive tours.

Long Haul – long haul segments include the United Kingdom, Germany, France, Spain, Italy, the Netherlands, Australia, Saudi Arabia, the United Arab Emirates (UAE), and Iran. The potential attractions for tourists from these markets include islands and beaches, nature, food and culture, heritage, affordable luxury, honeymoon, and Muslim-friendly attractions.

The Domestic Market

Domestic campaigns aim to educate and introduce Malaysians and expatriates to new tourism products and local destinations that are unique and rich in history. They also focus on showing how domestic travel is an excellent way to bring people closer together, be it among family members and friends, between couples, or groups of young adults.

For 2018 to 2020, Tourism Malaysia aims to:

- ⇒ Encourage domestic tourists to stay at paid accommodation.
- ⇒ Increase domestic tourism expenditure through the MICE segment.
- ⇒ Convert excursionists/day trippers to domestic tourists.
- ⇒ Increase the average domestic length of stay from 2.31 nights to 3.0 nights.
- ⇒ Rebrand and strengthen domestic signature events.
- ⇒ Enhance the functions of TIC and TMCC as centres of reference for tourism information and to include elements of commercialisation in selected TICs by selling tourism products, such as packages, hotels, and tickets

Convention & Exhibition Market

The Malaysian Convention and Exhibition Board (MYCEB) was established by the Malaysian Ministry of Tourism and Culture. The role of the MyCEB is to further promote and position Malaysia internationally as the preferred destination for meetings, incentives, conventions and exhibitions including major events. MYCEB is entrusted to assist local and international meeting and event planners to bid for, secure and stage their international events successfully in Malaysia.

Promotional Campaigns

The main focus of the promotional campaigns by Tourism Malaysia is the series of Visit Malaysia Year (VMY) campaigns. Visit Malaysia Year is a septennial event and the following paragraphs outline each campaign:

- ⇒ The Visit Malaysia Year (VMY) campaign was first launched in 1990 with the theme "Fascinating Malaysia. Year of Festivals". The campaign was a success with Malaysia charting 7.4 million in tourist arrivals compared to 4.8 million in 1989. Kuala Lumpur's famous landmark, the Sultan Abdul Samad building was featured as the official Visit Malaysia Year 1990 logo. Malaysia's Independence Day was the anchor for 84 major events, 14 festivals and nine exhibitions during VMY 1990.
- ⇒ The success of VMY 1990 spurred another VMY in 1994. The theme was "Fascinating Malaysia. Naturally More". VMY 1994 maintained its words "Fascinating Malaysia" for the theme but injected a punch line "Naturally More" to reflect more things and events lined up for that year.
- ⇒ The third VMY was launched in 2007 in conjunction with Malaysia's 50th Independence Anniversary. Hence, the theme "Celebrating 50 years of Nationhood" was most befitting. Efforts were also intensified in all advertising and promotional activities, including the call for action "The time is now. The place is Malaysia" together with the highly successful slogan "Malaysia Truly Asia". The "Malaysia, Truly Asia" tagline has done an excellent job in positioning Malaysia's destination diversity. In line with the 50th

Independence Anniversary, over 200 events across the country with 50 major events were held to showcase Malaysia's wealth of tourism attractions. All in all, VMY 2007 charted 20.97 million in tourist arrivals, a rise of 3.42 million on 2006.

⇒ In 2014, Malaysia celebrated its fourth Visit Malaysia Year with the theme "Malaysia Truly Asia" to reflect the diversity in unity of all Malaysians. The Proboscis Monkey was chosen as the mascot while the promotional campaign started in 2013 with a series of year-long special events and activities leading to VMY 2014.

⇒ 2015 was branded the Malaysia Year of Festivals. Its objectives were as follows:
   - To showcase and celebrate the various cultures and festivals of Malaysia as a tourist attraction.
   - To leverage on the momentum of the growing tourist arrivals to Malaysia and increase repeat visits.
   - Act as a stepping stone to enhance Malaysia's tourism industry especially with the organising of various mega tourism events.
   - To provide a magical experience for tourists through the celebration of various festivals by the multi-cultural population of Malaysia

Tourism Malaysia's Digital Initiatives

Tourism Malaysia has an objective to intensify the use of digital marketing. They have a strong online presence across various social media platforms such as Facebook, Twitter, YouTube, Instagram and blogs. Initiatives include the following:

1. A Memorandum of Understanding (MoU) with Alitrip, an e-commerce platform owned by the Alibaba Group, to strengthen promotion in China. The Alitrip Malaysia Tourism Pavilion was launched in 2016. Through this e-marketplace, Chinese travellers can now access Malaysia's travel and tourism products and services directly, while the Malaysian travel trade can grow their share of the Chinese outbound market.
2. Tourism Malaysia's shopping promotion arm, SSM, has launched Miss SHOPhia, its digital icon who provides guidance to shoppers. It marks a departure from the conventional static advertising.
3. Introduction of visa-free entry and eVisa facilities to facilitate Chinese travel. This initiative resulted in a 26.7% growth in Chinese tourist arrivals. The eVisa has also been extended to nationals from India, Bangladesh, Nepal and Myanmar.
4. Moving forward, strategies to attract arrivals from key markets revolve around utilising digital media platforms for marketing and publicity. This includes:
   ⇒ Creating a new website that is ready for Visit Malaysia Year 2020 with new contents that are relevant and personalised for the target markets;
   ⇒ Revamping www.malaysia.travel and building a new design, in line with the current trends;
   ⇒ Providing new content with a new style of writing, photos, and videos;
   ⇒ Providing content in five different languages;
   ⇒ Ensuring that the content is streamlined with online advertising and other digital campaigns, including social media platforms;
   ⇒ Boosting content through smart partnerships with both local and international online travel providers;
   ⇒ Building other digital platforms and activities to support the new website to reach more audience and drive conversion;

- ⇒ Building two mobile apps. The first mobile app to be developed in 2018 as a complement to the new website. The second mobile app will be developed in 2019 and will target niche market segments such as games and ecotourism;
- ⇒ Organising a virtual/online travel fair in 2019 with bookable Visit Malaysia Year 2020 tourism products; and
- ⇒ Organising a #BeautifulMalaysia video contest or similar campaigns via website. This is a continuation of the same successful campaign organised in 2015

Monitoring

Monitoring of marketing campaigns is at an early stage and is focused on market research rather than using ROI or conversion studies. Tourism Malaysia has produced various in-house publications, such as 'Malaysia Tourism Key Performance Indicators 2016' and 'Malaysia Tourist Profile 2016 By Selected Market'. In terms of research, Tourism Malaysia conducts research and development activities to support the promotional efforts of Malaysia. Various surveys are conducted to help facilitate the development of more effective promotional campaigns and marketing strategies. These surveys include:

- ⇒ Departing Visitors Survey
- ⇒ Malaysian Outbound Survey
- ⇒ Hotel Occupancy Rates Survey
- ⇒ Hotel Facilities Survey
- ⇒ ASEAN Countries' Branding Awareness Survey

Industry Involvement: Coordination Quality Control and Licensing

Coordination

A key aspect of Malaysia's destination marketing strategy involves forming strategic partnerships with airlines and corporate bodies. As such, Malaysia Tourism is beginning to work closely with the industry. This is done through joint marketing campaigns and sharing expertise. Tourism Malaysia organizes regular "Tourism Malaysia Networking Days" designed as a platform where industry practitioners can meet with Tourism Malaysia and the Ministry of Tourism and Culture to discuss, brainstorm and invent/reinvent marketing and promotion initiatives. An example of government and industry working together is with Resorts World Genting's participation in the government's 10-year Genting Integrated Tourism Plan to build a new hotel tower, as well as bring in new attractions to Genting Highlands.

Tourism industry practitioners are provided with promotional-related advisory information on the tourism and hospitality industry from statistical information to guidance on how to apply for the requisite licenses from the Ministry of Tourism and Culture.

Tourism Business Quality Control, Licensing and Registration

The Ministry of Tourism and Culture has developed a client charter for its industry partners:

- ⇒ To provide quality and timely tourism services;
- ⇒ To provide quality tourism activities/programmes in order to promote the involvement and appreciation of society for the tourism industry;

- ⇒ To provide high quality and viable tourism infrastructures throughout the country; and
- ⇒ To promote the country as a premier tourist destination at domestic and international and levels

Quality Control and Industry Registration - The Ministry of Tourism and Culture is the authority that enforces and implements provisions in the Tourism Industry Act and the Tourism Vehicles Licensing Act including regulations. Operators are required by law to register and/or be licensed before beginning tourism related business activities. This includes the licensing of tourist accommodation premises, registration of tourism projects, administration of the Malaysia Tourism Quality Assurance scheme (MyTQA), National Library Membership Registration, museum volunteers registration, craft entrepreneurs registration and craft members registration.

The Malaysia Tourism Quality Assurance scheme is an initiative of the Ministry of Tourism and Culture to improve the quality of service and facilities for tourism products in Malaysia. It encourages a Tourist First approach to customer service. It allows participants to display their certification for promotional purposes, opportunities for training sponsored by Ministry of Tourism and Culture, attending trade missions overseas and lending opportunities under the Tourism Loan Funds. MyTQA objectives include to:

- ⇒ Increase customer confidence for tourism related products and services accredited;
- ⇒ Classify tourism products and up to standards; and
- ⇒ Inculcate a culture that values quality tourism products and services as well as quality improvements of tourism products and services in Malaysia;

Destination Marketing Campaigns: Kuala Lumpur

As a key Malaysian tourism destination, Kuala Lumpur (KL) is developing its own marketing strategy to complement the work done by the MTPB. For KL promotion is being undertaken by CHKL and the Kuala Lumpur Tourist Association (KLTA), which is an association made up of all companies involved in the tourism industry.

In 2000, the Kuala Lumpur Tourism Action Council (KLTAC) was set up. The aim was to closely coordinate with the MTPB and business organisations such as the KLTA, and be responsible for the marketing and promotion of KL.

Marketing is coordinated through The Kuala Lumpur Structure Plan with the objective of enhancing the role of Kuala Lumpur as an international commercial and financial centre. It aims to:

1. Develop KL as an attractive international tourist destination; and
2. Increase the average length of stay.

To create a distinctive city identity and image, CHKL aims to:

- ⇒ Create a city which conserves the best of its environmental, architectural and cultural heritage and which offers a rich blend of both the modern and traditional;

⇒ Promote culture and the arts, sports, education and health in the City as tourism products and as factors in enhancing the overall quality of life; and
⇒ Create a tropical garden city sensitive to its natural environment and appropriate to its tropical regional location

Assessment

Malaysia has a long pedigree in destination marketing and its approach is well documented. Malaysia is one of the OIC's leading tourism destinations and has an approach to destination marketing that is **appropriate for a destination in the late growth stage of the destination life cycle**. Marketing strategy is about protecting revenues and profit by maintaining product quality, adding new product features or support services to keep up with the competition, and transforming distribution channels to embrace the Internet.

Tourism Malaysia has carefully segmented the tourism market, between international and domestic markets, and developed approaches for each segment. They have intensified the use of digital marketing, with a strong online presence across various social media platforms. Monitoring of marketing campaigns is at an early stage and focused on market research. A key aspect of Malaysia's destination marketing strategy involves forming strategic partnerships with airlines and corporate bodies. As such, Malaysia Tourism is beginning to work closely with the industry. This is done through joint marketing campaigns and sharing expertise.

Malaysia scores well against best international practice in destination marketing. Tourism Malaysia has strong plans for events, collaborative marketing, digital engagement, promotion, targeting/segmentation, product development and research. It benefits from a good budget for destination marketing. Its scores indicate potential for improvement on branding, sustainability industry links, joined up government, and performance monitoring.

Table 7 - Key tourism statistics for Malaysia

MALAYSIA	2012	2013	2014	2015	2016	2017
Population (mid-year) (000s)	29510	30214	30709	31186	31661	31624
Direct Employment (000s)	2566	2676	2859	2914	n/a	n/a
International Tourism Arrivals (000s)	25033	25715	27437	25721	26757	25948
International Tourism Receipts (US$m)	20251	21500	22595	17584	18074	18323
Domestic Tourism Arrivals (000s) *	174448	193274	217452	235191	253878	n/a
Accommodation Establishments	2724	3094	4072	4799	4961	n/a
Accommodation Rooms	195455	209527	262021	304721	321972	n/a

Note: * Includes same day visitors

Destination Marketing in Senegal

Senegal's Marketing Strategy by Destination Life Cycle

Senegal's tourism products are largely at the early growth stage of the destination life cycle. In the early growth stages marketing strategy is about securing revenue streams and profit by developing a product portfolio, putting in place quality assurance, pricing to ensure growth of market share and establishing distribution channels. Senegal can be judged to be in the early growth stage of the destination life cycle with an immature and relatively uncoordinated approach to destination marketing. Documentation of the marketing process is not extensive. See Table 7 for a summary of relevant statistics for tourism in Senegal.

Senegal's Tourism Destination Resources and USP

- ⇒ Senegal is the oldest of France's former colonies with tourism resources that demonstrate rich cultural and natural heritage, with significant potential for eco-tourism.
- ⇒ St Louis has well preserved colonial architecture.
- ⇒ The capital city Dakar is still the destination most visited by tourists, making up 41% of the demand. However, it is also the most expensive destination.
- ⇒ In addition, Senegal has seaside resorts, thalassotherapy, thermal tourism, sport and leisure tourism.
- ⇒ The Fathala nature reserve has abundant wildlife.
- ⇒ Slave tourism is a growing attraction.
- ⇒ Senegal demonstrates two contrasting approaches to tourism:
    - French expatriates staff the Club Mediterranée village at Cap Skirring, and there is little contact with the local population; whereas
    - In the campements rurales integrales near Ziguinchor, the tourists share the life of an African village, the accommodation being provided by a co-operative of the villagers with government support.
- ⇒ The transport infrastructure is improving. The port of Dakar is the second largest in francophone West Africa (after Abidjan). The government is soon to open a new airport and a new airline, and an extensive road-building programme is underway. The government also has ambitious plans for the railway sector.

Destination Marketing in Senegal

Senegal has a huge tourist potential with the sector contributing 7% of GDP and it is the second largest economic sector in the country. The tourism sector in Senegal is considered as a very important sector, because it is an important source of income. As a result, the Government of Senegal has demonstrated a strong commitment to develop this sector.

Introduction

In the past, tourism in Senegal has suffered as a result of events in neighbouring countries, namely the conflict in Mali and the Ebola outbreak in Guinea. However, this has now been largely overcome and Senegal has a democratic and stable government which is reflected in the government's investment in travel and tourism. The location of Senegal, 5 hours flight from Europe and 7 hours from the East Coast of the US means that it has strong market potential. Both arrivals and air services form the US are growing. Nonetheless, Senegal's former colonial power, France, still contributes 25% of all arrivals. The government has set a target of three million tourist arrivals by 2023.

Governance of Destination Marketing in Senegal

Regulation, promotion and development of the nation's tourist sector is the remit of Senegal's Ministry of Senegalese Overseas and Tourism (Ministère des Sénégalais de l'Extérieur et du Tourisme (SENEX). A number of agencies, boards, and partnerships which administer, promote and regulate the Senegalese tourism sector report to the Ministry. These include:

⇒ The Directorate for the Study and Planning of Tourism (Direction des Etudes et de la Planification touristique);
⇒ The Directorate of Tourism Regulation and Structure (Direction de la Réglementation et de l'Encadrement du Tourisme); and
⇒ The National Agency for the Promotion of Tourism (Agence nationale de la Promotion touristique (ANPT)

In addition, offices of the Ministry specialise in tourism industry infrastructure and promotion funding (the Secrétariat du Comité de Gestion du Fonds de Promotion Touristique) and oversee a tourist industry training school (the Secrétariat du Comité de Gestion du Fonds de Promotion Touristique (ENFHT).

Markets

Domestic - Senegal's tourism performance is very dependent upon the quality of domestic supply. Here development of the market is needed. It is still at a low level but is growing due to the development of the Senegalese middle class.

International - Senegal's international tourism is growing. In 2017, local authorities recorded 1.4 million tourists as compared to the 984,000 visitors in 2015. Senegal also has significant potential for developing business and cultural tourism in view of its natural wealth, its rich culture and its location. An added opportunity arises if Senegal can market itself as a stable democracy that is safe in a region increasingly affected by turmoil. The positive growth in demand is a result of the governmental support of the sector as well as local travel companies. Visa-free entry, which was introduced in 2016, has helped to boost tourism in Senegal substantially.

Three-star hotels are the ones most sought after by tourists (42%), followed by two star hotels (31%), four star hotels (16%), and five star hotels (6%); as far as one star hotels are concerned, they only make up 5% of the total demand. In terms of distribution, international visitors represent 54% of all tourists and mainly choose leisure or business destinations. Around two thirds of total tourism revenue is generated by international tourists, whereas domestic tourism generates around a third.

Destination Marketing

In terms of destination marketing, the ANPT reports to the Ministry. Their destination marketing activities cover three key areas:

1 Key activities:

⇒ Implement the tourism promotion policy developed by the Government;
⇒ Enhance the attractiveness of the Senegal;
⇒ Boost internal tourism; and
⇒ Foster synergy amongst the different partners of the Government in the development of the sector

2 Specific programmes for tourism promotion:

⇒ Ensure the permanent provision of information on "Destination Senegal";
⇒ Develop tourist products and contribute to the improvement of the quality of services;
⇒ Coordinate Senegal's participation in international travel shows;
⇒ Develop a mechanism for the surveillance and analysis of tourist markets;
⇒ Assist hotelkeepers and tourist promoters based in Senegal in the development and promotion of their offers; and
⇒ Hold promotional events (such as for educators and press trips)

3 Promotion tools and instruments:

⇒ A "Senegal" label playing the role of umbrella brand for all stakeholders of the Senegalese tourist sector;
⇒ A multilingual web portal;
⇒ Generic and thematic promotion materials;
⇒ Media and off-media campaigns in Senegal and abroad (in target markets);
⇒ Partnerships with airlines and publishers of magazines and books; and
⇒ Participation in relevant international professional shows

Digital Initiatives

Despite a growing international profile, online distribution and marketing channels in Senegal are very underdeveloped. In part this is because the country's inhabitants do not have sufficient incomes to engage in the Internet and penetration is weak, thus discouraging local companies from investing in online activities. However, local companies are developing web sites that accept the constraints of working in West Africa and do not use large amounts of data.

Industry Involvement

Senegal is to be applauded for its goal to establish financial and technical partnerships to support initiatives and activities supporting the promotion of Senegal. Indeed, as Euromonitor (2014) recognizes, the Senegalese travel and tourism market has attracted internationally recognised companies, which have acknowledged the potential of the country's tourism industry and consequently invested in it. This international know-how has enabled Senegal to improve in terms of quality and thus competitiveness. The government will need to leverage from this competitive advantage in terms of marketing. They are supporting local entrepreneurs who are establishing small tour operating businesses.

Other Initiatives Required for Destination Marketing

Senegal is very a much a destination in the early stages of growth and for destination marketing to be successful a number of initiatives are required. This is particularly noticeable when Senegal is benchmarked against other OIC destinations.

Product - Challenges facing the tourism product in Senegal include the undiversified and insufficiently competitive supply, poor service quality and a lack of qualified labour. In addition, maintenance and renovation of hotel establishments is needed. Quality is neglected by many hotels and this is a major problem when dealing with international tourism. Consumers are very demanding, and in order to attract more tourists, Senegal needs a quality product. Resort areas such as Saly and Cap-Skirring need rehabilitation and upgrading and there is potential to develop destinations such as Point Sarene, Joal, Grand Cote, and Pays Bassari.

Planning - Senegal urgently requires an integrated strategy to market the Senegal destination. This will require strengthening the capacity of Ministry staff in the implementation and management of a strategic plan for tourism development and marketing. A key element of the plan should be development of sustainable tourism products and development of a rigorous system of tourism statistics.

Assessment

Senegal's tourism products are **largely at the early growth stage of the destination life cycle**, with an immature and relatively uncoordinated approach to destination marketing. This is particularly noticeable when Senegal is benchmarked against other OIC destinations. Senegal is very much a destination in the early stages of growth and for destination marketing to be successful a number of initiatives are required.

Tourism is the second largest economic sector in the country and is an important source of income. As a result, the Government of Senegal has demonstrated a strong commitment to develop this sector. It has a strong market potential. A number of agencies, boards, and partnerships which administer, promote and regulate the Senegalese tourism sector report to SENEX. Senegal's international tourism is growing a result of the governmental support of the sector as well as local travel companies. Government initiatives such as visa-free entry, has helped to boost tourism in Senegal substantially.

Auditing the destination marketing approach in Senegal against international best practice shows that the country has some strong initiatives but has still plenty of potential left to realise. Senegal is to be applauded for its goal to establish financial and technical partnerships to support initiatives and activities supporting the promotion of Senegal. The government is committed to the sector and provides a stability of funding. The attempt to involve other government agencies in tourism is also good, as is the recognition of the need for research and support for the industry players for tourism promotion. Nonetheless, the approach to promotion of the destination would benefit from being updated to bring it in line with the digital world. Consideration of events in the marketing approach more overtly and an upgrade of the quality of the product would be beneficial, as would the development of an over-arching tourism strategy and a robust statistical measurement system for tourism.

Table 8 - Key Tourism Statistics for Senegal

SENEGAL	2012	2013	2014	2015	2016	2017
Population (mid-year) (millions)	13.7	14.1	14.5	14.9	15.4	15.8
Direct Employment (000s)	154.8	163.2	168.8	166.4	173.5	177.5
International Tourism Arrivals* (Millions)	0.96	1.0	0.96	1.0	1.6	1.4
International Tourism Receipts (US$m)	470	500	500	n/a	n/a	n/a

Note

* Includes same day visitors

3. CASE STUDIES

3.1. Canada

Canada is a destination with natural beauty, diversity, and quality infrastructure that is benefitting from favourable brand recognition. As a result, in recent years Canada's tourism sector has shown strong growth, particularly from overseas (compare 19.4% share of visitors to Canada from overseas in 2002, to 31.3% in 2017). Here emerging Asia-Pacific and Latin America markets are also playing a larger role in overseas visitation, ahead of the historically strong US and European markets. In addition, the domestic market is strong. In 2017 tourism played a significant role in the Canadian economy supporting over 200,000 businesses in Canada, employing 1.7 million Canadians, and Canada's largest service export (OECD, 2018).

This desk case study of Canada's marketing operations and structure has utilised an extensive literature review, comprising written and visual literature, information and documents. It includes international resources drawn from the resources of relevant national institutions and scientific publications. The review includes academic, Government, civil society and Internet-based sources drawn from leading UK tourism research institutions.

Canada's Marketing Strategy by Destination Life Cycle

Canada's tourism products are largely at the mature stage of the destination life cycle, but with a vigorous product development strategy Canada also has products in the launch and growth stages. At the launch stage, marketing strategies include careful consideration of introductory pricing, establishing a clear brand identity, connecting with partners and developing appropriate distribution channels and developing customer loyalty. In the growth stages marketing strategy is about boosting revenues and profit by improving product quality, adding new product features or support services to grow market share, enter new market segments, maintain prices, and increase distribution channels to cope with the Internet. At maturity marketing strategies focus around maintaining quality, diversifying markets and new product development to extend the life cycle.

Canada's Tourism Destination Resources and USP

- ⇒ **National and provincial parks** Canada lies entirely outside the warm climate zone. Tourism products are based on the country's mountains, lakes and forests rather than its extensive coastline and are focussed upon the national parks. Most of the national parks are situated in the more scenic western part of Canada. The Canadian Pacific Railway (CPR) was largely instrumental in their creation specifically as tourist attractions and it is a product in its own right. There are also parks and conservation areas in each of the provinces, providing a variety of recreational facilities, but as products, they tend to be less developed than the national parks.
- ⇒ **Heritage products** In terms of heritage tourism products, Canada's separate identity is demonstrated by a number of heritage attractions commemorating French and British rule, including resistance to United States expansion in the War of 1812.
- ⇒ **Winter sports** The severity and length of the Canadian winter is seen as a challenge to tourism development, rather than a constraint in terms of seasonality and the closure of attractions. Indeed, Canada's climate has been a challenge in terms of the country's overall image. The northerly location together with its powerful USA neighbour has

resulted in an image problem of a boring, cold and featureless country. Canada has extensive facilities for winter sports and snow-based tourism products including snowmobile trails, and many ski resorts have been developed to meet domestic demand within reach of all the major cities. Some of the resorts in the Laurentian Mountains of Québec and the Canadian Rockies attract a growing international market. Canadian cities are well equipped to deal with winter, and in some, underground shopping centres provide full protection from the weather.

⇒ **Outdoor recreation** Summers, at least in southern and western Canada, are warm enough for a wide range of products including beach tourism and water sports. Specialist outfitters in even the most remote areas of Canada provide transport and equipment for fishing and hunting trips. Boating and canoeing are especially popular in the many lakes and rivers of the Canadian Shield with the old canoe trails form the basis for a system of 'heritage rivers'. About 80 per cent of Canada is classified as wilderness, mainly coniferous forest and tundra, while Canada boasts some of the world's largest lakes and 15 per cent of global freshwater resources. As a result, promotional literature highlights the unspoiled scenery and the great outdoors; but since most Canadians are city dwellers, the "Discover Our True Nature" campaign also emphasised the sophistication of Canada's cities, contrasting the traditional appeal of Québec with the contemporary attractions of Montréal.

⇒ **Events** Canada has developed a range of events at national, provincial and local level. As key drivers of demand, events are highly valued attractions. They act as catalysts, animators and image-makers for both business and leisure travel. The synergies between major events and tourism in Canadian cities and regions has meant that many destinations are devoting considerable resources to develop, attract and support major events in order to enhance destination attractiveness and competitiveness, and spread the benefits of tourism to regional areas. Nationally, Canada has hosted the Winter Olympic Games and has an annual Formula 1 Grand Prix at Montreal.

⇒ **Other** Canada is also developing a range of other products including the unique and authentic Indigenous tourism industry and culinary tourism.

The Organisation of Tourism Marketing in Canada

Figure 1 shows the organization of tourism in Canada. In Canada all levels of government play a role in promoting tourism. These include the Federal Government, the 10 provincial governments, the three territorial governments and the many municipalities. These agencies and their marketing responsibilities are outlined below.

Innovation, Science and Economic Development Canada

The Canadian federal department with responsibility for tourism is Innovation, Science and Economic Development Canada (ISED). ISED aims to foster a growing, competitive, knowledge-based Canadian economy. Within ISED, the Minister of Small Business and Tourism has the lead responsibility for the tourism sector. ISED is responsible for leading coordination among federal departments to support a whole-of-a government approach to the implementation of Canada's New Tourism Vision. It does this through the Canada's New Tourism Vision Steering Committee which brings together 18 federal departments and agencies directly implicated in Canada's New Tourism Vision. Participating federal organisations include:

⇒ Parks Canada, which is responsible for national parks, national historic sites and national marine conservation areas;
⇒ Canada's six regional development agencies, which support many local tourism-related investment initiatives; and
⇒ The Canadian Tourism Commission operating as 'Destination Canada', the national tourism marketing organisation

Destination Canada

Destination Canada is a Canadian Crown corporation wholly owned by the Government of Canada. It is the lead agency marketing Canada. Destination Canada works in conjunction with partners including provincial, territorial and regional destination marketing organisations. It is the aim of Destination Canada to promote Canada as a premier destination and showcase the country's most unique attributes. To be a truly competitive destination, Destination Canada has developed a long-term, collaborative strategy – North Star 22 - to increase visitation, grow market share, and contribute to economic prosperity. The strategy is elaborated below.

Tourism plays a critical role in Canada's entrepreneurial development and job creation. Destination Canada markets Canada abroad to leisure and business travellers to increase international arrivals and grow the Canadian tourism industry. The organisation's mandate is to promote the interests of the tourism industry and to market Canada as a desirable tourist destination. Specifically, the mandate includes to:

⇒ Sustain a vibrant and profitable Canadian tourism industry;
⇒ Market Canada as a desirable tourist destination;
⇒ Support a cooperative relationship between the private sector and the governments of Canada, the provinces and the territories with respect to Canadian tourism; and
⇒ Provide information about Canadian tourism to the private sector and to the governments of Canada, the provinces and the territories

Destination Canada has three key operational objectives (Destination Canada, 2016):

Figure 9 - Canada's three operational objectives

Objective 1 — •Increase demand for Canada with innovative marketing

Objective 2 — •Advance the commercial competitiveness of the tourism sector

Objective 3 — •Increase corporate efficiency and effectiveness

Source: Destination Canada, 2016

Contemporary marketing approaches

Destination Canada demonstrates a number of contemporary marketing approaches to tourism:

- ⇒ **Digital Engagement** On-line marketing and sophisticated use of social media are now at the forefront of most tourism marketing campaigns. For example, Destination Canada's Millennial Travel campaign aims to use social media channels to build awareness and interest in visiting Canada, by being present where travellers are speaking with other travellers and supporting the conversation through content distribution. Personalized marketing necessitates having access to mass amounts of data that can inform business decisions. Access to data through sophisticated analytics and interpretable reports can reveal patterns and trends in consumer behaviour, and inform decisions on which consumer demographics to target, when and through which channels.
- ⇒ **Partnerships** The organisation's partnerships are designed to be commercially relevant and enhance service delivery of programmes geared at driving long-term success for Canada's tourism entrepreneurs. This is based upon strong co-investment platforms for both public and private partners.

Destination Canada Strategic Plan: North Star 22

Destination Canada's mission is to 'propel a vibrant and profitable Canadian tourism industry over the long-run'. This is achieved through a multi-year sustainable strategy to outperform the global rate of tourism growth and capture increased market share for Canada. The five-year strategy, entitled North Star 22, is a multi-year, collaborative plan with partners for better marketing alignment, collaboration and co-investment. North Star 22 will serve as a focal point for the industry to come together in a coordinated and unified fashion to invest and promote Canada in priority international markets. The plan is underpinned by growing aviation capacity, currency advantages, a strong country brand and increased federal marketing investments,

Statistics Canada

Statistics Canada is the national statistical agency responsible for the collection and analysis of tourism-related statistics. Statistics are compiled on a number of tourism industries, such as air, boat, rail, bus and taxi transportation; traveller accommodation; food services and drinking establishments; amusement and recreation, and travel arrangement services. Statistics Canada is re-developing its two core national tourism surveys to create the National Travel Survey and the Visitor Travel Survey, both operative from 2018. Statistics Canada also compiles data on all international travellers cleared for entry into Canada, and generates two major products for the macroeconomic evaluation of tourism: the National Tourism Satellite Account and the National Tourism Indicators.

Regional Level Organisation

Provincial and Territorial governments play an active role in the development and promotion of tourism at the regional level. A good example of an approach to marketing at provincial level is provided by Tourism Alberta. Tourism Alberta's vision is to inspire the world to experience Alberta; their mission is to create economic value and prosperity with compelling invitations to explore Alberta. The growth strategy from 2016 to 2022 provides a focus on increased returns from tourism by growing the visitor economy and acts as a road map for the sector. This is a new focus away from a three-year rolling plan and two-year marketing plan. The strategy is underpinned by 'marketing playbooks' to provide insights into Alberta's approach to markets. The strategy's three key objectives are to:

1. Grow tourism revenues by:
   Defending the core Alberta market segment through regional campaigns and tourism experiences and matching marketing expenditure with stakeholders. This will extend marketing reach through collaboration. The strategy will also create experiences and demand outside of the peak season and develop a China-focussed strategy highlighting air access.
2. Strengthen Alberta's competitive position by:
   Identifying business partnerships to increase the reach and potential of the brand. The strategy also creates tourism ambassadors and encourages residents to have pride in the destination. Finally, Alberta will develop a range of experience-based products using market intelligence.
3. Drive organisational excellence by:
   Investing in people to nurture a culture of creativity and leadership.

The strategy will be evaluated using the Travel Alberta Corporate Scorecard. The scorecard sets realistic and measurable targets at a macros and micro level including tourism receipts, room bookings, industry satisfaction and employee engagement.

To support the strategy, Tourism Alberta has developed the ATIS 2.0 programme. This recognizes the need for digital strategies to deliver tourism information to engage with digitally connected travellers. Travel Alberta is helping tourism operators reach travellers in this new digital landscape by redeveloping the Alberta Tourism Information Service, known as ATIS 2.0. The free online marketing platform provides the Alberta tourism industry with a competitive advantage.

ATIS 2.0 helps tourism operators reach travellers in this new digital landscape by redeveloping the Alberta Tourism Information Service, known as ATIS 2.0. It is developed with non-technical business users in mind. The goal is to enable tourism suppliers to build and manage an online presence that creates interest and drives conversion. ATIS 2.0 also has a content service function to distribute information about businesses listed on ATIS to a growing network of tourism marketing partners. Tourism providers can enter their content through an ATIS 2.0 account for free which will then be displayed on a dedicated page for their business on the travelalberta.com website. Travel Alberta will also provide translation services to promote this tourism content for export-ready travel experiences to an international audience.

The new ATIS platform generates real-time reports that will provide tourism operators with insights on how travellers are finding their business and interacting with their content. They will see how many visitors have clicked on offers, where the traveller is from and whether they are clicking through from a desktop, tablet or mobile device. This will give tourism providers the opportunity to adjust their content to attract more guests.

In Canada, network approaches to co-ordination of governance arrangements have been identified at the regional level including (i) a government-led network governance structure, and (ii) a tourism organisation-led industry network governance structure.

Government-led network governance structures Destination Canada partners with many regional and local organisations to jointly develop and promote tourism products. For example, together with Tourism Yukon, they are promoting the frontier region and Destination Canada has developed Signature Experiences in all three Territories of Canada's North to help local tour operators to showcase Northern adventures, such as Arctic safaris, cruises and excursions to view the Aurora Borealis. Other examples of partnerships include (i) a Signature Experience initiative in Alberta, where tourists take part in a cattle drive at a ranch and sleep in an authentic western bunkhouse; and (ii) co-operation between the public and private sector in resource management. Stakeholders include federal government, provincial/territorial governments, local communities – especially those of the 'First Nations', and tour operators.

A tourism organisation-led industry network governance structures Whistler provides skiing in the winter and other activities year-round. Whistler is committed to protecting the natural mountain environment and moving to become a sustainable resort community. The two key organisations involved in the network are:

- ⇒ The Resort Municipality of Whistler (RMOW) is Whistler's local government led by an elected council. The RMOW administers the Whistler2020 Comprehensive Sustainability Plan and Whistler's Official Community Plan.
- ⇒ The Whistler Resort Association or Tourism Whistler is an independent organisation. It is a Community Destination Management Organization (CDMO). It represents more than 7,000 members and affiliates who own, manage or carry on business on Resort Lands. Tourism Whistler was formed in 1979 in response to a recommendation by the provincial government to create a marketing and sales body to promote Whistler as a tourism destination. It is responsible for developing coordinated strategies in the areas of marketing and sales

Industry Involvement - The Tourism Industry Association of Canada

The Tourism Industry Association of Canada (TIAC) is the only national organization representing the full cross section of the tourism industry in Canada. Membership is derived of businesses representing transportation, accommodation providers, destinations and attractions from coast to coast. TIAC's mission seeks to encourage a healthy Canadian tourism market by increasing international visitation to Canada.

Coordination of Tourism Marketing in Canada

Coordination at government level is provided by the over-arching Canadian Council of Tourism Ministers. Ministers responsible for tourism from each jurisdiction meet as the Council annually to discuss trends and issues of concern to the Canadian tourism sector and work together to seek solutions. The Council has agreed to the Nunavut Declaration, a declaration committing to collaboration on important issues in order to grow and increase the competitiveness of Canada's tourism sector. Key areas for federal-provincial-territorial collaboration include:

- ⇒ Marketing, the sharing economy, air competitiveness and access, labour and workforce, Indigenous tourism, festivals and events, parks tourism, and statistics and research.
- ⇒ As Destination Canada is the lead marketing agency, the 'North Star' initiative supports the Nunavut Declaration through collaborative marketing activities aimed at positioning Canada's tourism sector for long-term success.
- ⇒ Capitalize on the 2018 Canada-China Year of Tourism in 2018.

In addition, the Destination Canada acts to coordinate the marketing of Canada with the governments of the provinces and the territories and to market Canada as a desirable tourist destination. This is achieved through 'Tourism Town Halls' which allow owner-operators to provide first hand input on issues affecting their business and the tourism industry including marketing.

Tourism Town Halls work in partnership with the Tourism Industry Association of Canada, to bring together and provide an opportunity to engage small- and medium-sized business owner-operators to better understand efforts being made on national tourism issues.

Tourism Marketing Programmes in Canada

Canada's New Tourism Vision was launched in May 2017. The New Tourism Vision is a strategic, whole-of-government approach coordinating action across federal departments and agencies to help grow Canada's tourism sector and increase international visitation. The Vision is guided by three overarching goals:

1. Grow international visitation to Canada by 30 % by 2021;
2. Double visitation from China by 2021; and
3. Position Canada to compete for a top-ten ranking as an international destination, by 2025

In order to achieve these goals, the Vision sets out a detailed Action Plan that identifies 20 action items focused around three pillars:

1. Investments in effective and more sustained marketing;
2. Measures to facilitate easier access to Canada; and
3. Tourism product development through support for Canadian tourism businesses and operators as they upgrade their offerings with new, innovative products and services

The campaign is detailed in Supplementary information at the end of this section.

Investment and Funding to Support Canada's New Tourism Vision

Canada supports the tourism sector with guaranteed long term, predictable funding streams. The federal government demonstrated its commitment for Canada's tourism industry through a 2017 Budget commitment to stabilize the funding of Destination Canada to C$95.5 million beginning in government fiscal year 2018/2019. With this additional funding, Destination Canada will extend its international marketing reach. Being able to assert a greater marketing presence in the international landscape promises to attract increased arrivals, enabling Canada to further its share of the outbound travel market. Other financial measures include improving tourism statistics collection through Statistics Canada, investments in Parks Canada and development funds for Aboriginal tourism.

Key Performance Indicators

Destination Canada has a rigorous system for gauging the effectiveness of its promotional campaigns through KPIs. Two examples of campaign evaluation are detailed below:

Evaluation of North Star 22

Destination Canada is committed to an industry-wide goal and anticipates long-term outcomes of the strategy to be an enhanced competitive position internationally for Canada, increased market share, and investor confidence in the industry premised on sustainable growth. The evaluation metrics attempt to distinguish the agency's particular contribution from the industry's collective performance. KPIs are based upon:

- ⇒ The number of international visitors;
- ⇒ Spending by international visitors;
- ⇒ Partner: Destination Canada co-investment ratio; and
- ⇒ Marketing expenditure: total expenditure ratio.

Consumer Direct Marketing

To demonstrate the impact of marketing campaigns by Destination Canada on arrivals, campaign effectiveness studies on a sampling basis of leisure markets was undertaken. Since 2013, Destination Canada has employed a third party to annually assess a subset of leisure markets on a rotating basis. Although marketing activities directed at consumers are used in all markets, it is cost prohibitive to conduct studies in each market annually. As such, a sampling methodology serves as a directional indicator of the effectiveness of their marketing approach in all markets. In 2015, the leisure markets assessed were Australia, Germany and the UK. Based on evaluated campaigns in only these three countries, Destination Canada's marketing efforts worked to attract 150,500 travellers to visit Canada, resulting in foreign traveller spending of $231 million.

Issues and Lessons Arising from The Canada Case

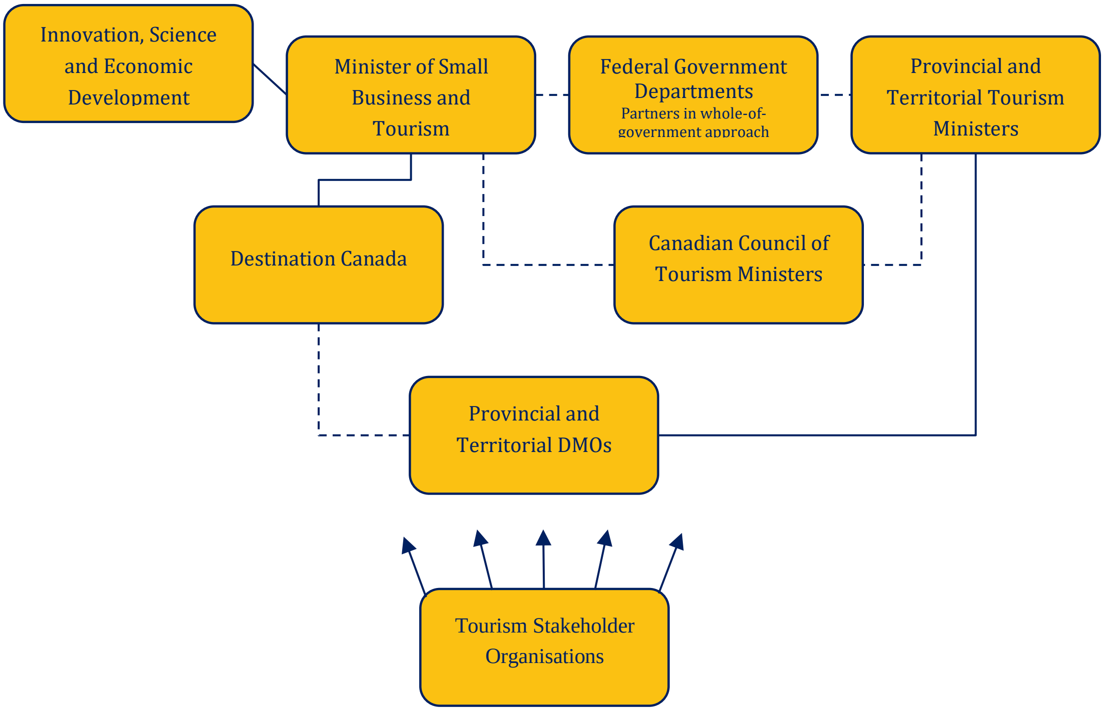
There are a number of very clear lessons for good practice that emerge from this examination of Canada's approach to tourism marketing and promotion and how it is organized. These include:

- ⇒ A long-term time horizon for marketing strategies builds continuity, coherence, certainty, and confidence across the sector.
- ⇒ It must be recognised that tourism is not simply the preserve of central governments, but encompasses all levels of government, where different mandates and levels of

autonomy apply. It is therefore imperative to clearly identify the roles, functions, and interactions of key public and private sector stakeholders involved in tourism marketing and bring them together in an effective manner. Canada's coordinating mechanisms through the Canadian Tourism Minster's Council and Destination Canada's 'Tourism Town Hall' approach are exemplary here.

⇒ It must be recognized that there is considerable value of strong dialogue between government, industry, and civil society.
⇒ Marketing depends upon the creation of added value based on identified comparative advantages, diverse high quality tourism offerings, and sustainable management of natural and cultural resources such as national parks.
⇒ The growth of international travel, notably from the Chinese and other Asian markets, provides opportunities for the sector. To succeed in these markets requires research, connectivity and reduced barriers to travel, including visa requirements and entry procedures while also addressing growing concerns about security.
⇒ There is a need to maintain diverse source markets in order to avoid over-dependency and risk from unexpected downturns in certain markets.
⇒ Continuity and long-term commitment to funding tourism budgets delivers confidence in the sector and the ability to plan in the long term. Tourism funding is viewed as an investment not a cost.
⇒ The preparation and launch of new policies and strategies can serve to galvanise the sector and stimulate a range of new commitments and agreements, as with Canada's New Tourism Vision.
⇒ Cultural and natural heritage is an important part of Canada's tourism product base and appeal. Policy demands that these assets are conserved in their own right as well as in the interests of tourism and the role of parks Canada working with the tourism sector is exemplary here.
⇒ It is important to ensure environmental scanning alerts the sector to mega-trends and allows the agencies to future-proof tourism policy.
⇒ Data should drive marketing decisions and the close working relationship between Statistics Canada and the tourism sector is exemplary here.
⇒ Evaluation of marketing and promotion activity is important to gauge return on investment. In Canada KPIs are rigorously assessed with some research outsourced to a third party.
⇒ Innovative and contemporary marketing approaches by tourism agencies ensure leadership in the sector. Development of digital marketing and capacity building is key here.
⇒ The tourism sector is primarily provided by micro, small and medium-size suppliers, and policy and programme support for them in marketing functions creates a competitive and sustainable destination.

Figure 10 – Canada: Organisational chart of tourism bodies



Source: OECD, adapted from Innovation, Science and Economic Development 2018

Supplementary information: Canada's New Tourism Vision Campaign

Pillar 1: Marketing

Action Item 1: Stabilized funding for Destination Canada -As part of Budget 2017, the government will invest $95.5 million in Destination Canada on an annual basis.

Action Item 2: The Connecting America Campaign - The U.S. leisure market accounts for 70 per cent of overnight visitors to Canada and is Canada's single largest source of international tourists.

Action Item 3: The Millennial Travel Program - Millennials are an exciting and growing group of tourists. The number of international youth trips is expected to double by 2020, to 300 million annually.

Action Item 4: Harnessing the digital economy and innovative technologies - Destination Canada is working to better use data to improve how it markets to international travellers, specifically audience segmentation and targeting. Working collaboratively with provincial and territorial partners, Destination Canada will use new technologies to develop a common framework, improved methodology and universal performance metrics to measure success.

Pillar 2: Access

Action Item 5: Lifting the visa requirement for Mexican Nationals

Action Item 6: Expanding the Visa Application Centre network

Action item 7: Expansion of the Electronic Travel Authorization Program

Action item 8: Liberalizing Canada's bilateral air transport agreements

Action item 9: Exploring options to clarify the permitting requirements for the Northern Cruise Line industry

Action item 10: Improving accessible transportation in Canada

Pillar 3: Product

Action item 11: Growing Indigenous tourism - In 2015, Indigenous tourism generated $2.7 billion in gross economic output, $1.4 billion in GDP (up from $596 million in 2002) and more than $142 million in taxes. The number of Indigenous tourism businesses has also grown, from 892 businesses in 2002 to well over 1,500 in 2014.

Action item 12: A The number of international outbound tourists from China more than doubled between 2008 and 2015, from 47.7 million tourists to 128 million.

Action item 14: Distinguishing Canada as a premier tourism destination through Canada's national parks. Over 22 million people visit Parks Canada's sites each year.

Action item 15: Growing culinary tourism - This includes tourism experiences like food trails, agro-tourism (i.e., visiting agricultural regions), vineyard or brewery tours, and taste-of-place experiences, where tourists visit a venue such as a restaurant, market or food festival.

Action item 16: Celebrating Canada's Francophone heritage

Action item 17: Promoting Canadian arts and culture internationally - Canada's arts and culture scene plays an important role in branding us abroad.

Action item 18: Investing in our regionally diverse tourism offering - Canada's Regional Economic Development Agencies support tourism by investing in local tourism businesses, products, experiences and organizations.

Action item 19: Investing in tourism sector jobs and skills training - Supporting skills development is a core element of the government's plan to support Canada's middle class and those working hard to join it.

Action item 20: Strengthening Canada's tourism data and metrics - Reliable, clear and comprehensive data is necessary to making evidence-based decisions to support the Canadian tourism industry.

North Star 22 – Detail of Millennial Travel Sub Programme

Millennials, broadly defined as 18-34 year olds and travelling for leisure, are the fastest-growing travel segment in the world. By 2020, trips by millennials are expected to reach 300 million. In 2015, Destination Canada launched a three-year Millennial Travel Program designed to encourage domestic millennials to consider Canada for their next vacation. The campaign features a digital hub showcasing over 150 Canadian travel experiences via an exhilarating travel video series. Additionally, travel offers from national, provincial, territorial and destination partners, as well as from SME tourism businesses, have been integrated into the campaign. In 2016-2017, the campaign was extended to an international audience of millennials in the markets of Australia, France, Germany, Japan, South Korea, the US, and the UK.

The KPIs for the campaign are to:

- ⇒ Reach 4.4 million Canadian millennials.
- ⇒ Increase travel by 5%.
- ⇒ Generate 150,000 leads to partners.

3.2. Turkey

Since 2000, the tourism sector has experienced significant growth and change reflected in the country's economic and political restructuring. Turkey has become an attractive destination through a combination of competitive prices and a range of attractive destination resources including classic beach destination combined with a powerful heritage and culture product. The appeal of Turkey will be boosted by new investment in transport and accommodation infrastructure including additional domestic flight routes; Istanbul new airport; Galataport, the new cruise terminal in Istanbul; and the first ever Peninsula Hotel in Turkey.

Turkey's Marketing Strategy by Destination Life Cycle

Turkey's tourism products are largely at the growth stage of the destination life cycle. In the growth stages marketing strategy is about boosting revenues and profit by improving product quality, adding new product features or support services to grow market share, enter new market segments, maintain prices, and increase distribution channels to cope with the Internet.

Turkey's Tourism Destination Resources and USP

- ⇒ **Heritage products** Turkey's geographical position results in considerable heritage and cultural attractions from different civilizations. The heritage of the Ottoman Empire is a major part of the fascination the country holds for Western visitors. Turkish traditional culture, including one of the world's finest cuisines, craft industries such as carpet weaving, and the vibrancy of its performing arts, help to give the country a clearly defined tourist image. Yet for many centuries prior to the arrival of the Turks from Central Asia, the region then known as Asia Minor was occupied by many earlier civilisations, including the Hittites, Ancient Greece, and the Roman and Byzantine empires. Turkey is extraordinarily rich in antiquities as a result. Istanbul was chosen as European capital of culture in 2010. Turkey also offers strong cultural tourism with a wide range of folk and traditional cultural festivals.

- ⇒ **Coastline** The climate and attractive coastline also provides the setting for a range of sun, sea and sand products. Turkey has an extensive coastline along four seas with considerable coastal development of beach tourism, including some mass tourism resorts.
- ⇒ **Natural resources** In addition, there are creeks, lakes and mountain areas suitable for sports and alternative tourism products.
- ⇒ **Other Resources** There is potential for golf and health/medical tourism to name but a few of the growing tourism areas.
- ⇒ **Events** Turkey's European credentials are underlined by its capacity to organize a number of sport and cultural events. The country is home to the world's most important culture and art festivals. Along with festivals of local scale, held in almost every city of the country, cultural events and other festivals of international reach are also organized in major metropolitan centres such as Istanbul, Antalya, Izmir, Ankara, Bodrum or Konya.

Some of the major art and culture festivals in Turkey:

Antalya International Film Festival	Istanbul International Film Festival
Aspendos International Opera & Ballet Festival	Istanbul International Theatre Festival
Istanbul International Opera Festival	Izmir International Film Festival
Izmir International Short Film Festival	Antalya State Opera & Ballet Festival
Antalya International Choir Festival	Antalya International Folk Music & Dance Festival
Mevlana Whirling Dervishes Festival	Bodrum International Ballet Festival
International Istanbul Biennial Festival	

Turkey has been considered to be one of the most attractive destinations in recent years because of affordable prices and variety of options available for tourists. In addition to classic sun & sea vacations, the country attracts tourists for cultural and historical visits as well as for MICE (Meetings, incentives, conferences and exhibitions). Turkey also offers strong cultural tourism with a wide range of folk and traditional cultural festivals. It also aims to promote other tourism alternatives such as golf and health tourism in the long term. The Belek region stands out as the most significant golf destination in Turkey, ranking among the world's most popular tourism centres with 15 golf courses, a 50,000-bed capacity, and 2 million tourist arrivals. Moreover, Belek was named the Best Golf Destination in Europe by the International Association of Golf Tour Operators (IAGTO) in 2008. Medical tourism is also expected to develop, attracting visitors from Europe and the Middle East.

With regard to religious tourism, Turkey is among the few countries in the world that is home to sites from a number of major religions. Of a total of 316 relics, 167 of them belong to Islam, 129 to Christianity, and 20 to Judaism.

The Organisation of Tourism Marketing in Turkey

Figure 2 shows the organization of tourism in Turkey. At the national level, the Ministry of Culture and Tourism is responsible for tourism in Turkey. It has a range of directorates covering activities relating to marketing, as well as investment, training and conservation. The Ministry has forty-six Culture and Promotion Offices in 41 different countries. These offices undertake promotional and marketing activities, and cultural and art events to promote Turkey as a tourism destination.

Other key ministries include:

- ⇒ The Ministry of Environment and Urbanisation;
- ⇒ The Ministry of Food, Agriculture and Livestock;
- ⇒ The Ministry of Economy;
- ⇒ The Ministry of Development;
- ⇒ The Ministry of Forestry and Water Affairs; and
- ⇒ The Ministry of Transport, Maritime and Communications

The overall public budget allocated to tourism sector in 2017 is TRY493.6 million of which the Ministry of Culture and Tourism receives TRY138.3 million.

At the provincial level there are 81 Provincial Culture and Tourism Directorates.

Local administrations and municipalities also have responsibilities for tourism, as do other agencies such as those in the major cities. Here, Istanbul with the Istanbul Convention & Visitors Bureau (ICVB) is a good example of a local tourism organization.

The ICVB is a non-profit destination marketing organisation working as a branch of Tourism Development & Education Foundation – TUGEV. The main goal of the ICVB is to represent Istanbul around the world and to seek international associations and corporations planning to hold high-profile international congresses and events. ICVB members include the leading corporations and associations involved in the conference and incentive tourism such as hotels, conference and exhibition centres, DMC and PCOs, airlines and other companies. The ICVB, working in close collaboration with the Turkish Ministry of Culture & Tourism, the Istanbul Chamber of Commerce and the Istanbul Metropolitan Municipality; designs and implements special events and other marketing strategies to raise Istanbul as a congress and event centre.

The private sector is also closely involved in marketing and promotion activities for Turkey. This is mainly done through professional and industry associations. These include:

- ⇒ The Association of Turkish Travel Agencies
- ⇒ Touristic Hotels and Investors Association
- ⇒ Hoteliers Federation
- ⇒ Turkish Tourism Investors Association
- ⇒ Tourist Guides' Association
- ⇒ The Prime Minister's Investment Support and Development Agency
- ⇒ The Hotel Association of Turkey

An example of the activities of the private sector associations in marketing and promotion is provided by the Hotel Association of Turkey (TÜROB). TÜROB is a prominent NGO (Non-governmental Organisation) in Turkey's tourism sector. The aims of the organisation include promotion and marketing. It:

- ⇒ Pioneers the tourism promotion, marketing and sales development studies of Turkey, conducts necessary studies and develops an effective marketing target.
- ⇒ Compiles international tourism data, evaluates the market position and development of Turkey, conducts resource market analyses and informs members about short and long-term marketing strategies.
- ⇒ Communicates opinions and suggestions with relevant authorities on tourism communication and management.
- ⇒ Represents Turkey in international tourism fairs and workshops/roadshow events organized by sector cooperation.
- ⇒ Organizes promotional and marketing activities by inviting important tourism professionals and press members to Turkey.

There are also many local associations throughout Turkey in the travel and tourism sector.

Coordination of Tourism Marketing in Turkey

Clearly, with a large range of stakeholders involved in tourism in Turkey, coordination of initiatives and the channelling of energy is a key issue. Here, the Ministry of Culture and Tourism of Turkey organises Tourism Councils involving both central and local government representatives and private sector representatives. Turkey's tourism sector plans to have a more integrated structure for the delivery of the tourism product.

In the Tourism Strategy document of Turkey, Turkey's Tourism Marketing Strategy has been outlined as:

> To commence with marketing and promotion strategies at each destination in addition to the national marketing and promotion campaigns with the ultimate objective of branding on a national, regional and local scale.

More specifically, the strategy outlines the following as key to success:

1. **Advertising**
   The Ministry of Culture and Tourism started allocating funds on advertisements in 1999, this move made Turkey the sixth most popular tourist destination in 2014. However, the ministry cut the advertising budget from $120 million to $15 million. The move contributed to the decline in the number of foreign tourists in 2015. Turkey should follow the lead of countries like Greece which spend around 2 per cent of their GDP on promoting tourism. Advertisements on trade publications can get the eyes of travel sellers interested in Turkey. Placing ads in a smart and targeted manner can help promote Turkey as a great tourist destination.

2. **Partnerships**
   Partnerships will help Turkey promote tourism and reach a broader and more desirable audience. Instead of creating a broad base of followers on its own, Turkey can get

partners with existing great numbers of followers. They can partner with national travel agencies by granting them special deals and promotions for their customers in exchange for access to their network of customers.

3. **Sponsorships**
Sponsorships can be done in any shape or size from local to national events with its own target audiences to promote tourism. Turkey can sponsor more events and distribute giveaways like promotional pens to create awareness. They can sponsor more high-visibility sporting events to globally promote Turkey. Televised events have the extra benefit of local, national and international media coverage which can multiply the country's potential for reaching a wider audience.

4. **Community Involvement**
People around tourist destinations are great assets; Turkey can involve them in promotional activities. Residents have inside information about things that might appeal to tourists. Local residents from different income levels, ethnicities and ages can help Turkey identify different attractions; they can be involved in local brainstorming.

5. **Culture and National Heritage**
Tourism in Turkey is focused largely on culture and national heritage sites like the Temple of Artemis and the Mausoleum of the Halicarnassus which are two of the seven wonders of the ancient world. Heritage tourism encourages travelling to experience the places, artefacts and stories of people in the past. Promoting culture through heritage tourism has a positive economic and social impact as it establishes a unique identity and helps to preserve Turkey's cultural heritage while promoting it to the world.

6. **Event Promotion**
Turkey is home to different great festivals and events. There are popular music festivals, cultural, national and religious festivals, sport and outdoors events, lifestyle events and wonderful Turkish festivals. A visit to Turkey at any time of the year can include a matchless experience of art, music, history and culture. National and religious events are celebrated with great enthusiasm in Turkey and have the potential in attracting foreign tourist. Local government and tourism agencies can work hand in hand to create effective tourism promotion.

7. **Trade Shows**
Trade shows bring together every aspect of the travel industry in one place for meeting, interaction and new deals. Every travel and tourism suppliers gather in trade shows, this is a good opportunity to sell our tourist destinations to the national travel agencies who have millions of customers.

   Trade shows around the country and the world can draw media attention and create awareness on tourism.

8. **Digital Marketing**
Application of digital marketing strategies is a great way to reach tourists who use the internet before making their travel plans. Travellers today rely on digital technologies for travel inspiration as well as research and booking. They also use different devices for all types of travel activities, from research, travel arrangements, booking and check-

in. Search engine optimisation and search engine marketing is the best way to promote tourism online. The official travel portal needs to be optimised to make it more visible to online visitors. Turkey can also develop a comprehensive guide to online marketing for tourism partners which can implement an online booking system.

9. **Online Booking and Payment**
   Digital technologies can add value to the services. Today, over one third of all travel bookings are made online. Utilizing online booking and payment systems gives ease to the most potential tourists. If tourists can book and pay online, they will be more likely to be interested to visit Turkey again. Offering 24 hour booking and payment online encourages tourists that visiting Turkey is accessible and up-to-date.

10. **Social Media**
    New technologies like social networking sites enable people to interact, communicate and share ideas on the internet. Social media can be a great way to engage with people with relative ease and little cost. Turkey can use social media for maximum benefit for the country's tourism promotion. By encouraging tourists to share their photos, stories and experiences using a unique hashtag on social networking sites like Facebook, Pinterest, Instagram and Twitter Turkey can promote tourist engagement. Turkey can use social media as an interactive tourist guide with integrated street navigation to help tourists find their way. Social media accounts can also drive traffic to the country's tourism sites.

11. **Off-Season Promotion**
    Tourism is an activity which enables tourists to enjoy during their free time at their disposal. All of the four seasons exist in Turkey, but the tourist high season is from mid-April through mid-September. Most tourists prefer to visit Turkey during spring and autumn when the sun is warm and the skies are generally clear.

    The majority of rainfall occurs in winter but don't underestimate Turkey in winter, the perks of visiting popular destination are endless. Travelling in Turkey in February is considered to be off-season but can be a good promotion opportunity as most hotels, tours, restaurants and activities offer incredible discounts.

12. **Promotional Documentaries and Publication**
    Documentary video films on important tourist spots of Turkey focusing on the beauty of the country can be used in television advertisements and tour operators' presentations to promote to potential tourists. Printed sales literature carries key messages in pictures. These information materials can be used in advertising and sales promotion in specialized journals and special interest magazines. Promotional documentaries and publication can motivate local and foreign tourist to visit tourist spots.

Importance of collaboration between Foreign Ministry and Tourism Ministry

Cultural promotional activities on an international scale play an important role with regard to the image of a country and its prestige, as well as the effectiveness of the foreign policy it desires to pursue. It is important to put promotional activities which could be used flexibly as an effective foreign policy instrument into a strategic framework, and to work in coordination and collaboration with all relevant institutions and organizations. Cultural promotion is an inseparable part of foreign policy and should, therefore, follow its priorities. Success in promotion depends on adopting an approach based on long-term planning, a global perspective and diligent implementation.

The Ministry of Foreign Affairs has therefore been given by law the mandate of implementing and coordinating foreign policy, carrying out relations with foreign countries and international organizations, ensuring the harmonization of foreign relation activities of other ministries and institutions with foreign policy and coordinating their activities.

In this context, in order to address the actual demands of the cultural promotion of the country, the Ministry of Foreign Affairs collaborates with all relevant institutions and organizations, especially with the Ministry of Culture and Tourism, non-governmental organizations, private sector and academic circles which perform promotional activities.

Turkey has been a cradle and bridge for many civilizations, inherited traditions and cultures of earlier civilizations, created its own culture and contributed in this respect to other countries and people. Promotional activities strive not only to facilitate communication, to eradicate prejudices, to provide accurate information and a positive image, but also to cultivate awareness. Turkey exploits cultural relations in order to strengthen a mutual understanding among countries, to create an appropriate platform for joint action and by creating networks that play an essential role in achieving success in the exercise of public diplomacy.

Millions of Turkey's citizens, kinsmen, as well as communities with an affinity to Turkey exist in other countries. Hence, the cultural promotion of the country is directed not only at foreigners, but also at people of Turkish origin and such communities living abroad.

The focus of promotional activity is to introduce to the world, through various activities, the values, history, language and literature, archaeological assets, scientific achievements, art, architecture, cuisine, traditions, beliefs, role models and sports unique to Turkey. The approach to this end is to utilize the universal language of culture and art, and to realize activities that will leave a lasting impression in the minds of people.

In this regard, the Ministry of Foreign Affairs collaborates with the relevant Turkish authorities' institutions in carrying out numerous cultural promotional activities which appeal to large numbers of people in other countries, including in the Balkans, Iran, Central Asia and China. Among these are exhibitions promoting the country, contributing to organizations of Week of Turkey, Year of Turkey events and festivals, taking part in existing festivals and cultural events, organizing conferences abroad on Turkish foreign policy, producing promotional documentaries and publications.

Tourism Marketing Programmes in Turkey

Turkey's maturity as a tourism destination has been reached through the evolution of tourism policies, plans and programmes. In the period 1982 to 2007, the emphasis was placed upon aggressive marketing through the development of new markets, extending the range of products and putting into place a good governance model for tourism.

In addition, three regions were identified for their unique products - Istanbul, Antalya and Cappadocia. Finally, practical support was given to the private sector in terms of entering the market by providing support to ecological and local products, women in jobs, education-based projects, social responsibility projects. For cities such as Istanbul and Antalya marketing is focused upon the city travel project, with aims to make them popular destinations among the tourists. Istanbul is being given more preference as it was designated the Cultural Capital of Europe for the year 2010, which would force the strengthening of its cultural, artistic, urban as well as the environmental qualities of Istanbul.

Building on this strong foundation, the Ministry has developed a new strategy to take the sector to 2023. The Strategy has the explicit aim of strengthening the coordination between the private and public sectors in tourism and guiding the travel and tourism sector through the stages of production, management and implementation of tourism. The Strategy places an emphasis on development and branding at the destination level and sets out an integrated regional development strategy of point destinations linked by corridor routes.

The Strategy sets out Turkey's tourism objectives and goals regarding marketing and promotion with the vision,

> 'To commence with marketing and promotion activities at each destination, in addition to the national marketing and promotion campaigns and the ultimate objective of branding on a national, regional and local scale'.

For marketing and promotion, the Strategy sets out a number of work packages which include:

- ⇒ Enhancing Turkey's competitiveness, market share and brand value in tourism on an international scale;
- ⇒ Enhancing cooperation between the public and private sector marketing initiatives;
- ⇒ A disciplined approach to marketing activities based upon research and scientific analysis;
- ⇒ Developing a sustainable image of Turkey following recent political and terrorism events;
- ⇒ Leveraging from digital communication opportunities and developing the capacity to do so;
- ⇒ Use of film locations as a promotion medium;
- ⇒ Highlighting the development of destination brands;
- ⇒ Research and environment scanning of global trends and their impact upon tourism marketing activities;
- ⇒ Target East Asia and Pacific markets;
- ⇒ Set aside 1% of tourism revenues for marketing and promotion;
- ⇒ Spreading and developing tourism activities all year round and across all the regions of the country by diversifying alternative tourism types, particularly health tourism, and enhancing the quality of tourism sector

A particular focus of the Strategy is on alternative approaches to tourism promotion. Four alternative approaches are identified:

1. Single target group-based promotion strategy - this accounts for single pre-determined target segments to ensure targeted marketing and spending effort;
2. Intensified promotion strategy - this is aimed at multiple target segments;
3. Total promotion strategy - this covers all segments in a given market; and
4. Undifferentiated promotion strategy – this accounts for the common characteristics of multiple segments, acknowledging the differences among them.

Though the Tourism Strategy of Turkey -2023, the focus of Turkey's destination marketing strategy is on the country's product diversity, on motivations to travel for other than sea-sun-sand tourism, seeking to spread visits throughout the year and to the regions in a balanced way.

Here, the Strategy supports diversification by improving the Infrastructure required for specialist tourism sectors and activities, aiming to increase tourism revenues in order to generate employment and increased incomes for all segments of society with a balanced use and conservation of strategic natural, cultural, historical and geographical assets. This is supported by the 10th Development Plan for 2014-18 which supports activities to enhance health and thermal tourism, winter sports, mountain climbing, adventure trips, plateau tourism, ecotourism, golf tourism, cultural tourism, cruise tourism, and convention/expo tourism.

Here, in terms of diversification, one of the 25 Priority Transformation Programmes designed to achieve the 2023 targets and objectives as part of the Tenth Development Plan, is the Health Tourism Improvement Program. This programme involves collaboration between the Ministry of Health and the Ministry of Culture and Tourism. It enhances competitiveness by raising the quality of services in the field of thermal tourism. The Ministry provides investment and planning support to selected thermal tourism centres, establishing new models for development including the integration of thermal/spa hotels with care centres and parks.

The Strategy also focuses on growing domestic tourism, promoting cultural and touristic values to Turkish citizens by giving support to appropriate fairs and events, and aiming to make holidays available to all segments of the community through pricing strategies such as low prices during the off season. The Ministry also works in co-operation with the Association of Turkish Travel Agencies (TURSAB), through an "early reservation campaign" offering low prices for domestic visitors making reservations four to seven months in advance.

In addition, the Ministry of Culture and Tourism attaches great importance to social and digital media as a means to promote Turkey, and also to the use of video and film.

The Ministry of Culture and Tourism has organised effective promotional activities such as tourism and culture fairs, common cultural projects, public relations activities in order to present the strides Turkey has made in the last decade in economic, social and cultural fields. Moreover, in 2014 Turkey has started to implement a strategic approach for the first time regarding the process of "Country Brand," lack of which has been surely felt. In this context, a comprehensive advertising campaign was run.

It was oriented towards achieving a global image in the target markets, and creating a lasting and single-voiced communication in order to achieve a more professional and integrated campaign.

With the Turkey Home campaign, which did not limit itself to "tourism promotion", but stressed the dynamic structure and potential of Turkey, a sustainable creative work concept started to be implemented for the first time in Turkey.

At the beginning of 2014 Turkey put the campaign concept, which is capable of representing all values of the country, powerful, different, and dynamic, at the service of the country and its tourism industry.

The same concept was maintained throughout 2015 in the light of the global approach and the integrated marketing strategy at all target markets in order to develop and strengthen the brand identity of Turkey. In order to maintain stability and continuity of the promotion, so that a sustainable brand value is created and presented through a lasting and single-voiced communication, the country's campaign would continue.

The Turkey Home campaign, which has resolved the diversity of Turkey with an understanding of maintaining the visual unity, has been a unique example of sustainable and comprehensive communication in promotion. Lack of such communication in promotional work has been one of the top issues demanded by the tourism industry as well as academia and intellectual spheres. The concept is modular, so it could be used in promoting tourism, and it is regarded as an image campaign through which other sectors of the country could also be promoted.

The promotional work of the tourism industry has ever increasingly concentrated on digital marketing. Therefore, in 2014 the Ministry undertook its first global social and digital media campaign. A digital platform was built (https://hometurkey.com), where all social media channels concentrate to transfer Turkey's narratives very quickly to the world.

These social media channels that are capable of transferring the narrative enabled Turkey with the capability to target various advertisement types in order to reach its target audience.

Furthermore, by developing its first strategic partnerships with the strongest digital and social platforms, another gap that existed for years was now filled. Through successful account and content management, Turkey closed the gap between itself and the competitors that have been using the social media campaigns for years.

Through work conducted in 2014, Turkey gained several diverse products. A video series covering the most important values of the country, tourism products and destinations ranging from Turkish Coffee to the Grand Bazaar; from Baklava to Fairy Chimneys was made possible. The GastroHunt project and GastroHunt videos promoting the Turkish Cuisine attracted organic participants in social media. The new photographs obtained through the photo competition called "Turkey whose home/land?" were among the examples of these products.

The Turkey Home campaign was used in all promotional work carried out during 2014 and 2017 consistently and in an integrated manner. For example, in 2015 the Turkey Home campaign was used for the first time in more than 120 tourism fairs in 55 countries across the world. All over the world the specially designed stands addressed the people in the same visual language. Turkey continues to maintain advertising activities, as well as special public relations activities, that echo across the globe and place a greater emphasis on the cultural activities.

Marketing Communications and Branding

Turkey, the Mediterranean and Aegean regions, Cappadocia and Istanbul can be said to be destinations which have become brands from the point of view of domestic and foreign markets, with considerable penetration by overseas companies. Here, the promotion of the brand is done through Turkey's range of media marketing communications. These include national and international newspapers, magazines, TV channels (including satellite) and the Internet. The tourism sector makes use of advanced IT services for reservation, sales, customer relations, human resources, accounting systems, online promotion and marketing. Video and film media are also used in the promotion of Turkey. Since 2014, a global advertisement and image campaign "Turkey Home" has been sharing the life style, historical, cultural and natural values of the country through use of digital tools and multiple social media channels. Twenty-one promotional films have been produced. The Global Image Campaign now has almost seven million followers.

A themed advertisement film "Turquois" has been shown outdoors on digital screens and billboards, TV channels, and cinemas in target countries. An introductory film, taken to various festivals in co-operation with the International Committee of Tourism Film Festivals (CIFFT) was chosen as the best film of 2016 (www.hometurkey.com).

Partnerships

As mentioned earlier, partnerships help Turkey promote tourism and reach a broader and more desirable audience. Instead of creating a broad base of followers on its own, Turkey aims to get a partner with an existing great number of followers. Turkey can partner with national travel agencies by granting them special deals and promotions for their customers in exchange for access to their network of customers.

Sponsorships

Sponsorships are organized from local to national events with its own target audiences to promote tourism. Turkey sponsors events and distribute giveaways like promotional pens to create awareness. It sponsors high-visibility sporting events to globally promote Turkey (Manchester United and Barcelona football teams are sponsored by Turkish Airlines; Turkish Airlines also sponsors European Basketball competition). Televised events have the extra benefit of local, national and international media coverage which can multiply its potential for reaching wider audience.

Key Performance Indicators

The Ministry of Culture and Tourism understands the importance of monitoring and evaluating key performance indicators for Turkey's tourism marketing. However, the strategy and plans would be improved with more detail of the key performance indicators to be monitored, the monitoring review process, tools, methods and certification options that will assist in the monitoring and evaluation performance. The Ministry of Culture and Tourism decision to form two new bodies to aid in the task of identifying, monitoring and evaluating the KPIs will help to drive continuous improvement. These are:

1. The National Tourism Database Repository; and
2. The National Tourism Certification Service.

The National Tourism Database Repository will be tasked with collecting and organising the data transmitted by the various public and private sector entities.

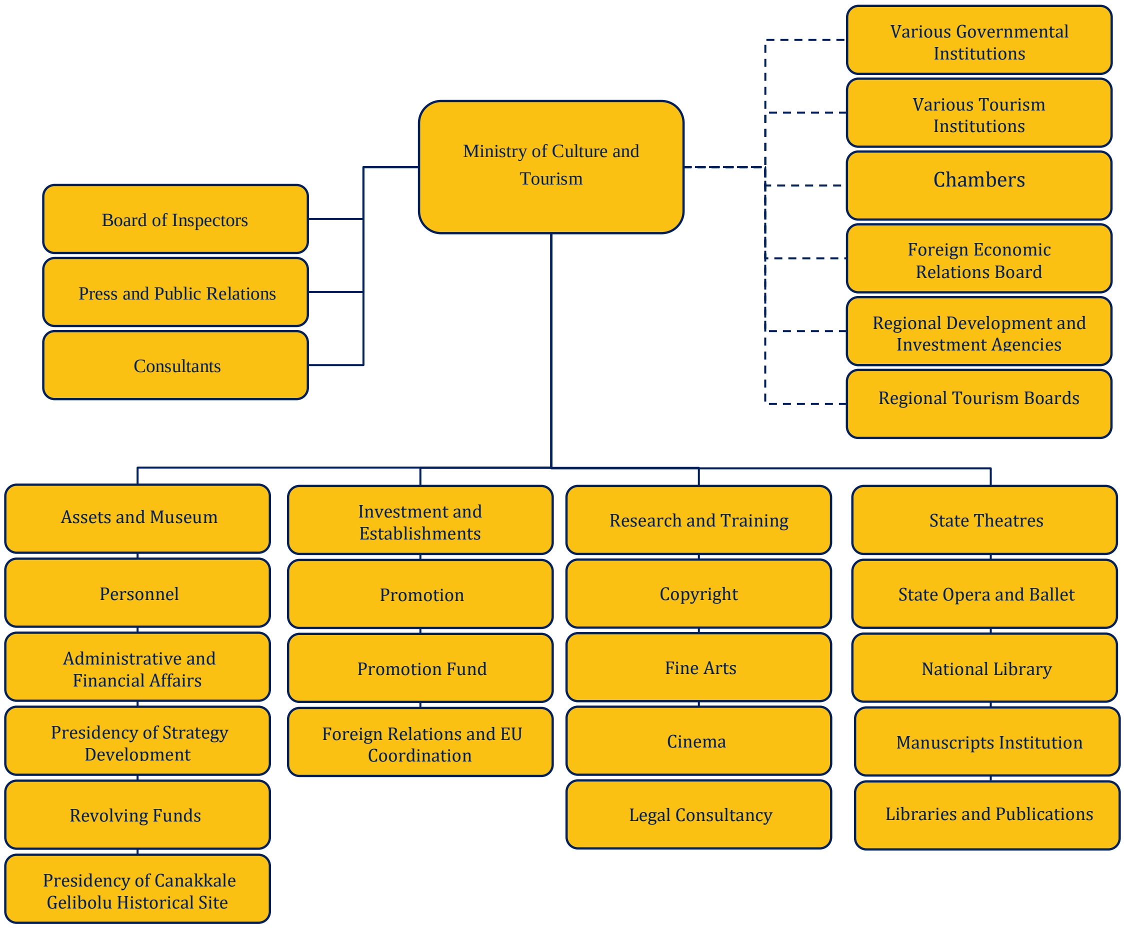
After analysis the repository will submit its conclusions and opinions to the Ministry of Culture and Tourism and the National Tourism Council. On reflecting upon the data and analysis received, the Ministry will decide on the KPIs and the monitoring review process. The National Tourism Service will then provide methods to implement amendments into the tourism strategy accordingly. However, the establishment of timeframes for the process would also be a positive move and help the industry to plan for the implementation.

Issues and Lessons Arising from the Turkey Case

There are a number of very clear lessons for good practice that emerge from this examination of Turkey's approach to tourism marketing and promotion and how it is organized. These include:

- ⇒ Recognition of the importance of a 'whole of government' approach to tourism, reflecting a coherent and comprehensive approach to tourism marketing and promotion. This recognizes that all levels of government are involved.
- ⇒ Recognition that tourism governance should be transparent, flexible and accountable.
- ⇒ The involvement of all stakeholders in the consideration of tourism marketing and promotion in Turkey through the establishment of Tourism Councils which would bring stakeholders together in an effective manner and that recognises the value of a strong dialogue between government, industry, and civil society.
- ⇒ The imperative of taking a long-term time scale for strategies and policies.
- ⇒ The importance of an integrated regional development approach of point destinations and linked corridor routes.
- ⇒ Recognition of the imperative to diversify away from mass tourism and to spread the load in both space and time using alternative tourism products such as health and thermal tourism.
- ⇒ The importance of recognizing local destinations as the place where tourism occurs and the use of local branding.
- ⇒ The importance of recognising the potential of digital media and the need for capacity development.
- ⇒ The need to strengthen promotion and development of the domestic market, including initiatives to extend holiday opportunities for all.
- ⇒ Recognition of the need to conserve and interpret cultural and natural heritage as a key element of the national product.
- ⇒ Recognition of the need to maintain diverse source markets in order to avoid over-dependency and risk from unexpected downturns in key markets.
- ⇒ Development and protection of the country's image, particularly in relation to recent political and terrorism events.
- ⇒ Resolve to set aside 1% of tourism revenues for marketing and promotion.

Figure 11 - The Organisation of Tourism bodies in Turkey



Source: OECD, adapted from Minstry of Culture and Tourism, 2018

3.3. United Kingdom

Tourism is an important sector of the United Kingdom economy, directly contributing an estimated £62.4 billion in gross value added in 2015. Tourism is growing at a faster rate than the overall UK economy, and makes a substantial contribution to employment with 1.6 million UK jobs directly attributable to tourism in 2015. In 2016, the number of international visits grew by 4% to a record 37.6 million generating over £22 billion of export earnings and the overall volume of domestic trips taken in the UK in 2015 increased by 9%. Tourism is growing rapidly outside London with attractions including world-class heritage sites, diversity of culture, the countryside and wilderness of Scotland and Wales, and events including Glastonbury and the Rugby World Cup.

The British people voted to leave the European Union in 2017 and this will have mixed results for tourism, on the one hand the fall in the value of the pound has boosted international tourism, whilst on the other hand the economy has suffered as a result of the decision.

UK Marketing Strategy by Destination Life Cycle

The majority of the UK's tourism destinations are in the maturity stage of the destination life cycle, although some of the more traditional coastal resorts are in the decline/rejuvenation stage. At maturity, destination strategies adopted include ensuring the maintenance of quality, prolonging the life cycle of the destination by (i) entering new market segments, and redefining target markets, and (ii) destination product modification through differentiation and pricing. For those destinations in decline, such as a number of the UK's cold-water coastal resorts, strategies include seeking new markets and developing new products such as casinos, special interest tourism and theme parks.

The UK's Tourism Destination Resources and USP

⇒ **The natural heritage including National Parks and countryside** National parks and other areas are subject to varying degrees of protection under planning law. In England and Wales national parks are required both to preserve their landscapes and to enhance their enjoyment by the public. Multiple use is also characteristic of the areas managed by the British Forestry Commission, which is charged with opening up the forests for tourism, and it has developed self-catering cabins in holiday areas for this purpose. The UK has many scenic lakes and reservoirs, including Loch Lomond, Windermere and Lake Bala as well as the Norfolk Broads. Other linear features include rivers and canals, both of which are extensively used for tourism, as are the Heritage Coasts and national hiking trails, such as the Pennine Way. Government provision for tourism and recreation is complemented by conservation trusts and charities, notably the National Trust which has purchased extensive areas of attractive coast and countryside, as well as a large number of historic buildings.

⇒ **The built heritage** in the UK includes:

- Many ancient monuments, of which Stonehenge is the best known;
- Medieval castles, abbeys and cathedrals;
- The great country houses which are now major tourist attractions with a much wider appeal than simply history-based tourism;
- Examples of Georgian and Regency architecture from the eighteenth and early nineteenth centuries in Britain's spas, seaside resorts, market towns and cities; and
- The legacy of the Industrial Revolution along with its engineering achievements.

⇒ **Attractions** such as national parks and the hinterlands of major cities and resorts are where the most successful *point tourist attractions* lie. There are three basic types:

1) Many attractions simply result from the opening of an existing resource - an ancient monument such as Edinburgh Castle, stately home or nature reserve;
2) Some attractions have begun to add developments (such as the motor museum and monorail at Beaulieu Palace) to augment the attraction and broaden their appeal; and
3) The third type of attraction is one artificially created for the visitor, including theme parks such as the Surfing Snowdonia, Alton Towers, the London Zoo, or pseudo-heritage attractions such as the London Dungeon.

- ⇒ **Events** at the national, provincial and local level, including major entertainment at national venues, and sporting events including a Formula 1 Grand Prix, the Commonwealth Games and the 2014 Ryder Cup as well as entertainment and music festivals including Glastonbury.

The Organisation of Tourism Marketing in the UK

Figure 3 shows the organization of tourism in the UK. Historically, the organisation of tourism marketing across the UK dates back to 1969 when the first act relating to tourism was passed. Since then tourism has been the subject of a number of government reviews and re-organisations. The most recent review was in 2015 when the current structure was put into place. There are a number of government agencies involved in this new structure, each with distinct roles and responsibilities. The main bodies are as a follows:

- ⇒ The Department for Digital, Culture, Media and Sport (DCMS) is the lead Government body for tourism in the United Kingdom. Tourism is a devolved competence in Scotland, Wales, Northern Ireland and London. DCMS retains responsibility for tourism in England and overseas promotion of Great Britain as a destination.
- ⇒ The British Tourist Authority (BTA) is the UK Government public body responsible for tourism. Visit Britain and Visit England are trading names of the BTA. Following the 2015 Spending Review, the Government clarified the distinct activities that BTA would undertake as Visit Britain and Visit England, each with a separate allocation of ring-fenced budget. To ensure collaboration between the two agencies, a single BTA Chief Executive was appointed.
- ⇒ Visit Britain is responsible for promoting England, Wales, London and Scotland worldwide and developing their visitor economy. With core funding through the DCMS and additional funding through the cross-government GREAT campaign (see below), Visit Britain works with a range of private and public partners to grow the value of inbound tourism. Visit Britain has an annual target to increase international visitor spend in England, Wales, London and Scotland.

- ⇒ Visit England is an advisory body which works to grow the value and quality of tourism in England.
- ⇒ Visit Scotland is a public body responsible to the Scottish Government. Its core purpose is to maximise the economic benefit of tourism to Scotland. It has responsibility for marketing Scotland in the United Kingdom and internationally, encouraging the highest quality standards within the industry, providing visitor information, and implementing an events strategy to support tourism and raise the country's international profile.
- ⇒ Visit Wales sits within the portfolio of the Welsh Department for Economy and Infrastructure. It is responsible for formulating tourism policy, and encouraging investment in, and improving the quality of, the visitor experience in Wales. Visit Wales is also responsible for marketing Wales in the United Kingdom and internationally.
- ⇒ In Northern Ireland, the Department for the Economy is responsible for tourism strategy and policy and has oversight of two tourism organisations: Tourism Northern Ireland is in charge of product development and marketing to visitors from the island of Ireland, and Tourism Ireland, which markets the island of Ireland in Great Britain and overseas. In addition, Invest NI administers accommodation grants and provides business support and advice to tourism businesses.

The Tourism Industry is closely involved in the marketing of tourism in the UK. The Tourism Industry Council was created in 2017 to act as a key point of dialogue between government and the industry. The Council is involved in identifying solutions to help the sector grow and ensuring that the tourism industry continues to make a direct contribution to the economy and increase the number of jobs created by the industry. It works with government to assist businesses, particularly small businesses, to help improve their productivity and grow. Specific campaigns target businesses in the hospitality sector and assists them to assess their performance, benchmark themselves and understand where there is room for improvement.

In Scotland, the Scottish Tourism Alliance (STA) is the overarching industry leadership group for tourism and the leading voice for the tourism sector in Scotland. The STA is an independent trade body comprising over 250 trade associations, businesses, destination groups and other organisations with an interest in tourism. This membership represents more than 70% of tourism business and ensures that STA's voice is held in high regard by Scottish Government and other bodies. Its main role is to lead on industry matters, represent the views of members and seek supportive change at policy level.

In Wales the industry is represented through the Wales Tourism Alliance and occasional Tourism summits are held to brainstorm and coordinate tourism activities.

DCMS funds the BTA through a grant-in-aid funding settlement. For the spending period 2016-2020, the BTA will receive approximately £26.5 million per annum, of which £19.5 million is for Visit Britain and £7 million for Visit England. In addition, the BTA receives approximately £23 million per annum from the GREAT Campaign to promote Britain abroad. At programme level, additional public funding was also made available in 2015-16 for a South West England Tourism Growth Fund of £5 million, and a Northern England Tourism Growth Fund of £10 million (extended to 2016-17) to support inbound tourism to these areas, largely through marketing.

Tourism funding in Scotland, Wales and Northern Ireland is determined by their respective devolved governments.

Regional level

England - The structure and responsibility for tourism at regional level in England is confused. Responsibility is split between two types of organisations: (i) Local Enterprise Partnerships and (ii) Destination Organisations. In addition, London has its own tourism agency reporting to the mayor of London.

Local Enterprise Partnerships - (LEPs) have responsibility for driving economic growth in their areas and working in partnership with key sectors and stakeholders. In LEP areas where tourism is a recognised tool for driving wider economic growth, work is underway on specific projects and initiatives in partnership with Destination Organisations who manage tourism locally.

Destination Organisations - are single entities created to coordinate the management of the destination. They come in a variety of shapes and sizes, handling everything from management to marketing.

London - London & Partners is the official promotional agency for London, attracting and delivering value to businesses, students and visitors. It is a not-for-profit public private partnership, funded by the Mayor of London and a network of commercial partners. Their remit is to drive leisure and business visitors as well as bidding to secure major events in London.

In **Wales -** there are four Regional Tourism Partnerships. They work in partnership with Visit Wales, the local authorities, tourism sector businesses and other local organisations to develop and implement regional tourism strategies. They also provide marketing for the region. They are:

- Tourism Partnership North Wales
- Tourism Partnership Mid Wales
- South West Wales Tourism Partnership
- Capital Region Tourism

In **Scotland -** the enterprise agencies provide business support and investment to encourage growth in the tourism sector at regional level.

In **Northern Ireland -** here are four regional tourism partnerships and organisations which support their members in providing assistance with tourism product development and in marketing local tourism providers at a regional and international level. They are:

- Visit Belfast
- Visit Derry
- Fermanagh Lakelands Tourism
- Flavour of Tyrone

Tourism Marketing Programmes in the UK

Visit Britain - The overall aim of Visit Britain is to grow international tourism and its benefits across Britain, with an emphasis on getting visitors to explore beyond London. Published in 2016, the Tourism Action Plan, outlines the UK government's five tourism priorities:

- The tourism landscape: strengthening coordination and collaboration;
- Skills: boosting apprenticeships and attracting more people to careers in tourism;
- Common sense regulation: examining the scope for deregulation;
- Transport: making it easier for visitors to explore by rail, bus and coach; and
- A GREAT welcome: driving continuous improvements in the UK visa service.

The fifth bullet point above is part of the GREAT campaign which is the focus of Visit Britain's marketing, undertaken with private sector businesses (see the end of this section for detail of the campaign). The GREAT campaign draws on the key triggers for travel to Britain including culture, heritage, and countryside, alongside shopping, food, sport, adventure and music. The campaign aims to:

- Build awareness of Britain's attractiveness as a tourism destination among those who have not yet visited Britain;
- Encourage prior visitors to return; and

⇒ Provide, in partnership with the private sector, opportunities and incentives to visit Britain.

The GREAT campaign is an ambitious four-year £100 million match funded marketing programme, and a multi-million pound GREAT image campaign, working with Government and a range of partners, including the Department for International Trade, the Foreign & Commonwealth Office, the British Council and the Department for Digital, Culture, Media & Sport (DCMS). The image and tactical campaigns work together with the image campaign driving the aspiration to travel and the tactical campaign converting that aspiration into bookings.

A key element of Visit Britain's marketing is developing a digital strategy. In 2016/17 Visit Britain worked towards the vision to be the leading digital tourism agency by 2020**.** The three-year digital marketing strategy is built on a 'test and learn' philosophy across all content, from tablet user experience to call-to-action copy. That enabled the generation of valuable insights to inform cross-channel investment decisions. The strategy is working towards delivering the most relevant and inspirational content to the right audiences at the right time by using the right channels, and this approach has seen the use of tailored content for diverse audiences, to showcase Britain's and England's tourism offer at home and abroad. The strategy aims to harness the power of digital across the whole customer journey.

Visit Britain also has a priority to contribute to a stronger and improved business visits and events sector. It continues to work on improving accessibility for all and providing tourism business support.

Visit England - A key focus for Visit England for 2016 to 2020 is the Discover England Fund. Visit England has been provided with £40 million over three years to build and grow outstanding English tourism 'bookable' products to drive international visits across the country. In 2016/17 the Fund created 20 year-one pilot projects and research to help English tourism adapt, grow and stay competitive. The Fund has also fostered long-term, joined-up working between destination management organisations (DMOs), industry and local enterprise partnerships to develop new, thematic products across England. Successful examples include:

Making exploration easier - a key strategic priority for the Fund is improving connectivity across England, opening up its many regions to more visitors. New products include:

⇒ The E-Car Club in Oxford and the Cotswolds meant visitors can now easily combine public transport with car travel, making it simpler to explore England's countryside.

⇒ Visitors from Gulf Cooperation Council countries now benefit from a twin-city package, created by London & Partners. It has established better connections from London to the regional hub of Manchester. Development of new sightseeing tours and day trips by Marketing Manchester positioned the city as a gateway to the north of England and have added even more appeal.

Regions and businesses working together - industry and local DMO partners collaborated to develop innovative, inter-regional products and itineraries that reinvigorated England's tourism offer outside the capital. New products include:

- ⇒ Fresh itineraries and tours were created by Marketing Birmingham and UK Countryside Tours, helping visitors explore more of England's countryside and waterways.
- ⇒ Visit Kent and other destination organisations produced Gardens and Gourmet passes showcasing outstanding gardens and restaurants in Kent, Cheshire, Essex, Hertfordshire and the Peak District.

Maximising digital - in year one of the fund, new products and platforms utilised the power of digital media to improve visitor experiences including:

- ⇒ Responding to more demand for mobile applications to complement visitor experiences, Compass Holidays enhanced a self-guided activity app
- ⇒ England's Heritage Cities achieved 6,574 downloads of a new mobile application and 42,831 visits to new pages for its 13 locations
- ⇒ Enhancing England's incentive travel market, Leopold Marketing created all-encompassing itineraries hosted on the cloud

Scotland - Following the successful 'meet the Scots campaign (see the end of this section for details of this campaign), Visit Scotland launched a new marketing campaign, The Spirit of Scotland, in 2016 (see Figure 2). This global campaign promotes and celebrates the unique tourism assets of Scotland, the experience visitors enjoy and the tangible spirit they describe when they are in the country. The Spirit of Scotland campaign uses the power of social media, new digital platforms and technology, such as virtual reality apps, to attract visitors from around the world.

Working closely with the tourism industry, Visit Scotland and the Scottish Government have devised and developed a series of themed years to keep the spotlight on Scotland as a leading tourism destination. These include:

- ⇒ Year of History, Heritage and Archaeology 2017;
- ⇒ Year of Young People 2018; and
- ⇒ A celebration of Scotland's Coast and Water in 2020

Building on successful delivery of the Commonwealth Games, the 2014 Ryder Cup, and Homecoming Scotland 2014, Visit Scotland continues to secure, develop and support a portfolio of major events.

Wales Visit Wales is responsible for programmes relating to:

- ⇒ Tourism policy
- ⇒ Encouraging investment
- ⇒ Improving the quality of the visitor experience in Wales
- ⇒ Marketing Wales within the UK and internationally

In terms of marketing the British domestic market is the main market for Wales and will continue to be the main focus. Marketing activity will be increased in London and South East Midlands and Yorkshire, as well as within Wales itself for the first time. Visit Wales has identified three overseas priority markets - Ireland, Germany and USA.

The Visit Wales 2013-2020 strategy identifies a product-led approach to developing and marketing tourism in Wales, working with iconic, high quality, reputation-changing products and events. The aim is for Wales to become well-known for being an outstanding adventure, culture, heritage and outdoors destination; and that these messages link-up to create a much more defined and compelling destination proposition for Wales. Specifically, the Visit Wales marketing effort will:

- ⇒ Grow a stronger and more defined brand for tourism in Wales in the long term;
- ⇒ Provide the opportunity to focus investment and innovation in tourism; and
- ⇒ Drive an increase in visitor volume and value to Wales each year

The 2013 -2020 strategy is focused on improving the tourism offer through supporting luxury high-end hotels, delivering iconic all-weather attractions and enhancing the visitor experience at heritage attractions, museums and cultural venues to sustain their long term viability. It also seeks to build potential in business and events, an area in which Wales has historically underperformed.

In 2015 Visit Wales launched a 3-year approach to promoting Wales based on a series of annual themes. This approach was in response to key challenges in promoting Wales as a destination and is driven by the aim of Wales becoming well-known for being an outstanding adventure, culture, heritage and outdoors destination; and that these messages link-up to create a much more defined and compelling destination proposition for Wales. The ambition of the approach is to grow a stronger and more defined brand for tourism in Wales. And the opportunity to focus investment and innovation built around thematic years. The annual themes are:

- ⇒ Year of Adventure in 2016
- ⇒ Year of Legends in 2017
- ⇒ Year of The Sea in 2018

The goal is to drive more than £320million of additional consumer spend in Wales from the domestic market and more than £7million of travel trade business to Wales from the top 100 operators.

Visit Wales has also developed a new strategy for partnerships - the Partnership for Growth: Strategy for Tourism 2013-2020. This strategy sets the vision for Visit Wales and the tourism industry to work in partnership to increase visitor spend to Wales. The strategy focuses on 5 key areas:

1) Promoting the brand
2) Product development
3) People development
4) Profitable performance
5) Place building

In partnership with National Parks, local authorities, the National Trust Wales and Natural Resources Wales, Visit Wales is working to develop the offer around mountains, inland waters, countryside, coast, and gardens.

Northern Ireland - In Northern Ireland work is ongoing to produce a new tourism strategy to 2025. This follows an independent review of tourism structures in 2014. The 2014 review had four key themes:

1) Setting the strategic direction for tourism;
2) Building relationships within the sector;
3) Closer alignment with Invest NI; and
4) Cultural change within Tourism Northern Ireland to develop a more customer focused approach

Events have continued to play an important role in tourism promotion.

Partnerships - The tourism agencies recognise that the overall success of the tourism industry is contingent upon its ability to work together to promote what it has to offer. However, they also accept that the costs of collaboration are high, as the sector is diverse, fragmented and competitive, and this can deter action - despite it being collectively beneficial. Nonetheless, the UK government recognises that partnership and collaboration is ever more important to ensure public money is spent effectively and the tourist boards have been tasked with deepening their partnerships.

As a result, the UK Government is taking steps to address this issue by creating an overarching industrial strategy involving a number of government departments, from Transport to the Home Office. This is designed to ensure that departmental action to grow tourism is coordinated. In addition, establishing a clear framework of government support and activity makes it easier for local areas to develop their own strategies to grow tourism.

In terms of partnerships, Visit Britain works with industry, government agencies, high-profile brands, the media and influencers to make Britain a must-visit destination internationally and to inspire the British to holiday at home. To achieve its objectives, Visit Britain works closely with a range of key partners both in the UK and overseas (https://www.visitbritain.org/industry-groups-bodies). These partners include:

⇒ Government agencies - Department for International Trade; The Foreign & Commonwealth Office; and the British Council;
⇒ The official tourism bodies for London, Scotland, Wales (actioned through Memoranda of Understanding, and destinations;
⇒ Airlines and operators;
⇒ Global brands, such as the Premier League;
⇒ Destination Management Organisations; and
⇒ Local Enterprise Partnerships

Visit Britain also has three-year strategic partnership agreements actioned through Memoranda of Understanding with national bodies such as Arts Council England, Historic England and National Parks England.

Visit Britain chairs a number of industry groups & bodies including:

⇒ The British Tourism Industry Group is Visit Britain's main stakeholder group bringing together senior representatives of Government, industry and tourism bodies to discuss issues of relevance to the industry. By facilitating a strategic dialogue between Visit Britain and the wider tourism industry, the group allows Visit Britain to fulfil its statutory role as a trusted advisor to government on tourism matters.

- ⇒ The Tourism Industry Emergency Response Group is a small group comprising key tourism industry organisations and government. It develops plans for crisis scenarios as well as managing the tourism industry's response to a specific crisis.
- ⇒ The Welcome to Britain Group brings together representatives of government, government agencies, tourist boards and other industry stakeholders whose activities have an impact on visitors' first impressions of Britain. The group's remit covers the experience of welcome overseas (for example, visa procedures), at points of entry/exit (such as border checks) and in country (the use of the transport network).

In 2016/17, a new partnership strategy was developed by Visit Britain focusing on:

- ⇒ Fewer, broader commercial partnerships;
- ⇒ Partner influence across the consumer journey;
- ⇒ Driving increased awareness;
- ⇒ Reaching target audiences through new channels;
- ⇒ Creating compelling products to convert interest into action; and
- ⇒ Amplified advocacy.

Key Performance Indicators

The UK government places a priority on value for money from public spending. As a result, tourism marketing has been subject to close scrutiny and clear, transparent key performance indicators (KPIs). In 2016/17 for example, it is estimated that for every £1 the Government invested in Visit Britain/Visit England for domestic and international marketing, a visitor spent £20.

Visit Britain has a well-documented and transparent set of KPIs and targets

guided by three key principles:

1. Data-driven targeting and prioritisation;
2. Alignment with targets and priorities set by Visit England, Visit Scotland and Visit Wales; and
3. Identification and quantification of the trade-offs between different strategic options

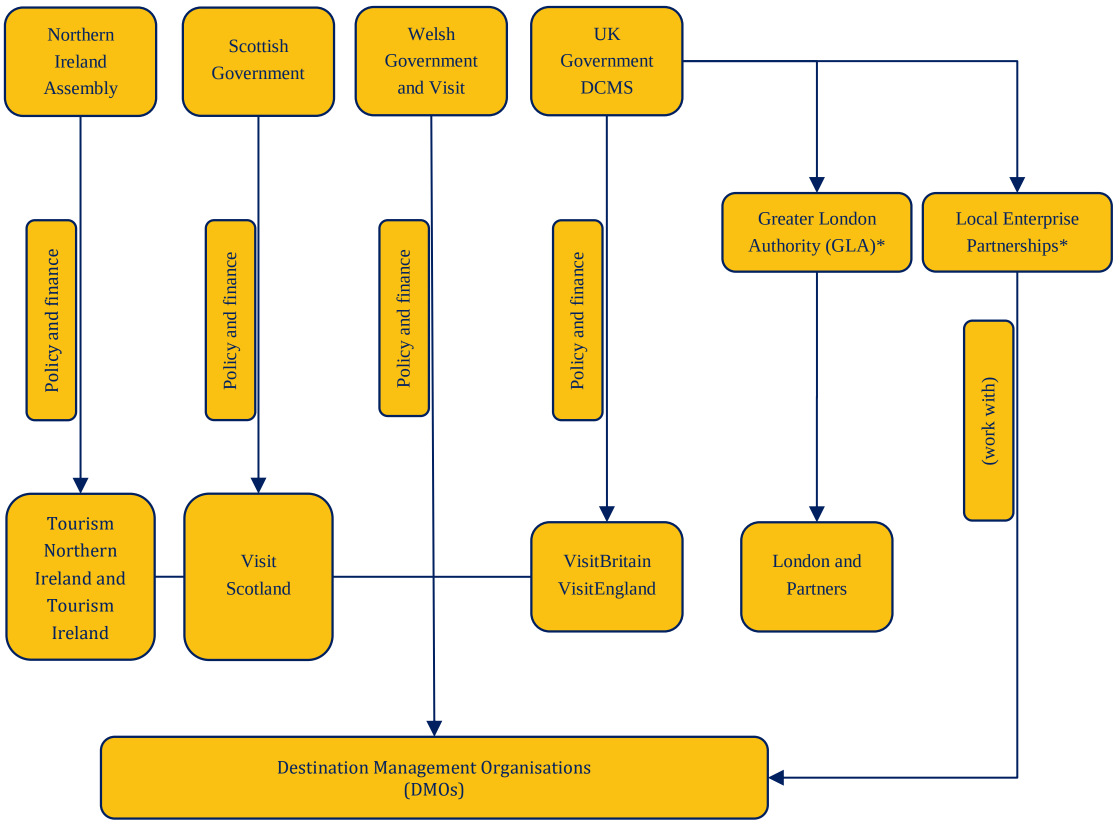
Targets are derived from the Oxford Economics' Tourism Decision Metrics model based on historic International Passenger Survey (IPS) data. The IPS data is fed into the Oxford forecasting model. Using these forecasts, targets are set for investment to deliver incremental spend and visits growth at a rate of +1.5% above the market level of growth delivered equally across all nations. Targets are discussed and agreed by the tourist board CEOs and confirmed by the Secretary of State for Culture Media and Sport.

Issues and Lessons Arising from The UK Case

There are a number of very clear lessons for good practice that emerge from this examination of the UK's approach to tourism marketing and promotion and how it is organized. Unfortunately, many of these are lessons on what to avoid. Lessons include:

- ⇒ Whilst it recognized that coherent and comprehensive approaches to tourism policy making are beneficial, the structural complexity of the UK's political landscape, allied to devolution policies, means that tourism policy and structures for marketing are disjointed and fragmented. Whole of government approaches have been attempted in a number of re-organisations but have not been a particular success. This is a salutary lesson for other countries.
- ⇒ Fragmentation and continual re-organisation has also meant that the long-term view has been difficult to achieve and policies and programmes are dominantly short term in nature. As a result, the consistency and certainty the tourism industry requires is not evident. Again, not an example to be followed.
- ⇒ The UK has recognized that tourism is not simply the preserve of central governments, but encompasses all levels of government, where different mandates and levels of autonomy apply. However, there has been a failure to clearly identify the roles, functions and interactions of key public and private sector stakeholders with duplication and overlap of responsibilities. Again, not an example to be followed.
- ⇒ Across the UK, recognition of the value of strong dialogue between government and industry is clear but implementation has been patchy due to the lack of priority given to tourism by government. Again, not an example to be followed. However, there is now a clear recognition of the need to develop a partnership approach to marketing to both coordinate the process and also ensure that public money is well spent.
- ⇒ Tourism policies and agencies do give priority to opportunities presented by digitalisation, both in creative and targeted communication and in the handling and analysis of data.
- ⇒ The growth of international travel, notably from the Chinese and other Asian markets, is providing opportunities for the UK, particularly with currency devaluation resulting from Brexit.
- ⇒ There are attempts to improve transport connectivity and reduce barriers to travel, including visa requirements while also addressing growing concerns about security.
- ⇒ The relationship between legislation, national policies and programmes, and the functions and activities of local government and DMOs is of particular importance. In the UK the regional organisation of tourism is confused and not consistent. As a result, there is no clear focus on the destination level for marketing and product development. The Discover England Fund is an attempt to correct this.
- ⇒ In the UK, the tourism sector is sensitive to the overall state of the economy and budgets have suffered at the hands of the Government's public spending austerity policy.
- ⇒ The UK government's austerity policy has meant that any public spending is closely scrutinized for effectiveness. This has led to clear and transparent KPIs and an ROI for all marketing plan and campaigns– an initiative that could be adopted by other countries.
- ⇒ Events are highly valued attractions as key drivers of demand and have been identified as a specific priority within the UK's tourism planning.

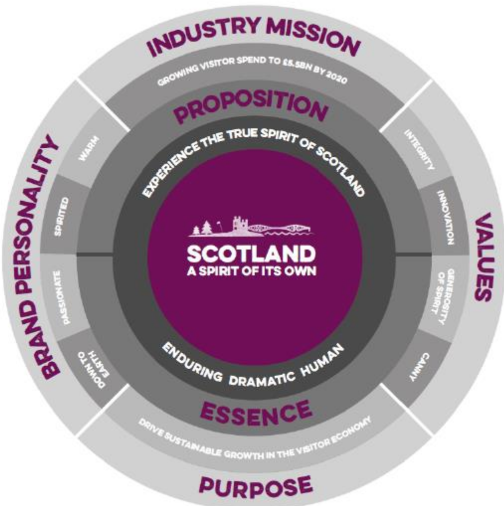
Figure 12 – United Kingdom: Organisational chart of tourism bodies



*Separate funding relationships apply.

Source: OECD, adapted from the Department of Culture, Media and Sport (DCMS), 2018

Figure 13 - A Schematic of Scotland's Marketing Approach



Source: VisitScotland, 2016

Supplementary information: Sample Campaigns

1. The GREAT Tourism Campaign

Aim

Continue to deliver the GREAT tourism programme and amplify the GREAT OMGB marketing campaigns.

Description

⇒ Continue to play a lead role in the GREAT campaign working with Government agencies and Departments to position Britain as a great place to visit, study, invest in and do business with;
⇒ Includes the Domestic GREAT campaign, the Foreign and Commonwealth Office managed GREAT Challenge Fund and GREAT Inverness Loch Ness Campaign;
⇒ Focus on four key stages of the consumer journey - Inspire; Consideration; Planning and booking; Sharing and advocacy;
⇒ Deliver through a global approach and market customisation, ensuring the right message and product are delivered at the right time to the right audience;
⇒ Clear path to purchase through in market activity linking partners and B2B developments; and
⇒ Align new product promotion from the Discover England Fund to global activity to ensure an integrated approach to promoting Britain and new England product.

Outputs

⇒ Deliver compelling communication campaigns that directly challenge significant barriers in a territory that can flex across a range of activities to appeal to the audience, whilst giving opportunities for audience involvement; and
⇒ Deliver these across the consumer cycle from inspiration to conversion to advocacy.

Outcomes

⇒ Deliver a return on investment of 25:1;
⇒ Position Britain as a fun, stimulating, welcoming place, full of surprising immersive experiences; counter negative and reinforce positive perceptions of Britain; and
⇒ Drive regional spread of international visitors by communicating the diversity of Britain's offer and the amazing moments consumers can have, book and share across the nations and regions under the GREAT campaign.

Evaluation

The campaign, in 2015/16 generated:

⇒ Over £800 million in additional visitor spend by overseas visitors;
⇒ £12.7 million in partner funding (cash and in kind) for inbound activity; and
⇒ Continuing to fly the banner for GREAT Britain.

Source: Visit Britain, 2016

2. Visit Scotland's Meet the Scots Campaign

Visit Scotland's international Meet the Scots advertising campaign ran in North America, Germany, France, Australia and the Middle East and was additionally communicated below the line in Spain, Italy, the Benelux and Scandinavian countries and New Zealand. The campaign was based on the successful 'Meet the Scots' concept, which used a group of 23 'Scots' ambassadors who each represent a different theme associated with Scottish tourism such as food and drink, Scottish culture, the activity or event sectors.

Using real people gave authenticity to the campaign and also helped convey the unique and iconic aspects of Scotland in ways that are intriguing, personable and contemporary. This approach helped to target the International Cultural Explorers market segment, who seek genuine experiences whilst on holiday and enjoy engaging with locals.

Objectives:

- ***Visitors to Scotland:*** Identify potential and previous travellers to Scotland and convert these into new and repeat visitors.
- ***Seasonal spread:*** increase the uptake of touring holidays particularly between March to June and September/October.

- ***Geographic spread:*** promote all areas of Scotland and encourage tourists to visits.

Activity:

At its core the Meet the Scots campaign featured an online calendar to provide information and inspiration to visit Scotland any time of the year. Each month was introduced by a different Scot and associated with a theme such as Celtic January or Whisky May. Bespoke content described the best events and activities that month as well as flora and fauna to look out for and seasonal produce to try. The Scots also shared their insider tips on these pages, so each month inspired consumers to stay longer and explore further.

The campaign was multi-touchpoint including advertising aligned with a strong PR programme and supported by e-newsletter communications, Social Media promotions, brochure fulfilment and an intermediary marketing programme. The advertising bias was towards online promotion as an effective and efficient way to reach an online savvy overseas audience.

All of the consumer touchpoints directed traffic to the Visit Scotland website.

Partners

The campaign was supported by industry partners such as United, Qatar, CIE Tours, Lufthansa, KLM, Germanwings and DFDS Seaways.

Evaluation

During spring / summer 2012 the Meet the Scots campaign generated £115 million for the Scottish economy.

Source:
http://www.visitscotland.org/what_we_do/marketing/campaigns/previous_campaigns.aspx

4. FIELD VISITS

Introduction

In addition to the desk research undertaken to analyse the Case Studies for Canada, Turkey and the United Kingdom, three further markets were selected for primary fieldwork. All three markets are OIC Member States and they were selected for their relatively different stages in the life-cycle development of a destination.

The three markets selected were:

- ⇒ Lebanon
- ⇒ Mozambique
- ⇒ Turkey

Turkey is the most mature market of the three destinations and Mozambique is at an early growth stage. Lebanon was included to explore the additional challenges presented for a tourism destination operating within in a challenging political environment.

Methodological approach

A combination of both quantitative and qualitative research methods were employed in this component of the study. A quantitative survey approach was undertaken to gather information directly from international visitors to each of the destinations and this was complemented by a programme of qualitative interviews with a range of stakeholders operating within the tourism industry in each destination.

Quantitative research

A quantitative survey was carried out in each of the destinations during June-August, 2018. Overseas visitors (aged 18+) to each of the destinations who were visiting a range of attractions were selected to be the target population. The questionnaire used to collect the visitor feedback can be found in Appendix I and in the appendices. Data was collected by a combination of face-to-face interviews and an online questionnaire. Applying a random sampling approach, a total of 500 questionnaires were issued and 393 usable surveys were obtained, resulting in a response rate of 78.6%.

A range of information was collected in the survey including the international visitors' perceptions of each destination, levels of satisfaction from the visit, intention to revisit and recommendation of the destination. Also measured was the relative importance of each marketing technique/method employed by the destinations.

Qualitative research

Personal interviews were chosen as the most appropriate method for the qualitative phase of this project. As destination marketing and development is a particularly sensitive and personal topic or experience, which requires the dynamic involvement of different stakeholders with conflicting interests, it justifies the decision of using such an approach with selected individuals. In this way, the respondents will gain a better understanding of why the information is necessary and, thus, they are more willing to provide the researchers with detailed and pertinent information.

For the purpose of this study, the semi-structured interview was chosen as the preferred data collection technique (Altinay & Paraskevas, 2008; Bryman & Bell, 2011).

The sample of respondents included within the programme of semi-structured interviews was selected based on the experience and expertise which each stakeholder could bring to destination marketing and development. The sample included National Tourism Organization representatives; tour operators; accommodation providers; food and beverage providers; professional associations; cultural institutions; transport providers; Ministerial contacts and tourism educators. Overall, 30 semi-structured interviews were conducted (ten from each of the three destinations). Each interview lasted around 90 minutes and, with the respondent's permission was recorded and transcribed in order to facilitate the analysis process.

Key Findings from the Survey of International Visitors

The primary focus of the survey of international visitors was to establish their opinions of various elements of the tourism product offered by each of the three destinations. Using a 5-point scale where 5 was the maximum score and 1 the minimum score, the respondents were asked to rate 19 constituent elements of the destination product which were grouped under four categories, namely:

- ⇒ **natural and cultural resources** – good weather, interesting cultural attractions, beautiful scenery and interesting natural attractions, high level of authenticity
- ⇒ **tourism development** – professional services by hospitality staff, high quality tourist services, high quality food, a good range of leisure activities,
- ⇒ **general infrastructure –** accessibility, well-developed infrastructure, shopping alternatives, good choice of accommodation, offering good value for money
- ⇒ **social setting/environment** – relaxing environment, very safe and secure, very clean environment, a lively environment, friendly local people

The key results for each of these categories are outlined in the following sections.

Natural and cultural resources

Overall, Mozambique emerged as the leading destination in this category with a mean score of 4.33 out of 5 compared to 4.26 for Lebanon and 4.23 for Turkey. It was rated highly for *beautiful scenery and interesting natural attractions* (4.44) and especially for *a high level of authenticity* (4.30).

Lebanon scored highest for *interesting cultural attractions* (4.27) and was only a little behind Mozambique for *beautiful scenery and interesting natural attractions* (4.39). In contrast, it rated relatively low on *a high level of authenticity* (3.95).

Of the three destinations, Turkey attracted the lowest ratings for both *interesting cultural attractions* (4.16) and *beautiful scenery and interesting natural attractions* (4.27). It was rated higher than Lebanon for *a high degree of authenticity* (4.05) but considerably lower than Mozambique on this measure.

The fourth element in this category was *good weather* and there was little difference between the three destinations on this aspect – each receiving rating around 4.40.

Tourism development

None of the destinations emerged from the analysis as leading the way in this category of the tourism product:

- ⇒ Lebanon was relatively highly rated for *a good range of leisure activities* (4.33) but was relatively low rated for the two *service* elements
- ⇒ Mozambique scored best for *high quality food* (4.37) with Lebanon a little lower (4.26). While scoring just below Turkey for *professional services by hospitality staff* (4.23), Mozambique had a rating of below 4 for *high quality tourist services*
- ⇒ Turkey performed best relative to the other destinations in the delivery of *professional services by hospitality staff* (4.26) and also for *high quality tourist services* (4.10). In contrast, Turkey rated the lowest for *leisure activities and* (scores of less than 4)

Overall, each the three destinations were rated lower on *tourism development* in comparison to *natural and cultural resources* as constituent elements of the tourism product.

General infrastructure

As a category, Turkey (4.07) was rated the best destination, scoring relatively well on each of the five elements of the tourism product which were featured in the survey. It was rated best of the three destinations for *accessibility* (4.10) and also for having a *well-developed infrastructure* (3.87).

Mozambique had the highest ratings for both a *good choice of accommodation* (4.30) and also for *offering good value for money* (4.34) – two elements for which Turkey also had good ratings; 4.16 for *a good choice of accommodation* and 4.24 for *offering good value for money*. In contrast, Mozambique performed less well on the other three elements within this category with ratings below 4 – especially in relation to *a well-developed infrastructure* (3.27).

Lebanon rated highest for *shopping alternatives* (4.12) and also had a relatively good rating for a *good choice of accommodation* (4.11). However, it performed less well for the other three elements with ratings below 4 – especially in relation to *a well-developed infrastructure* (3.18), as was the case with Mozambique.

Overall, this was the category for which both Lebanon and Mozambique were rated lowest of the four tourism product categories covered within the survey with an overall rating below 4. Turkey had a higher rating than the other destinations (4.07) which was similar to that received for the tourism development category (4.08).

Social setting/environment

This was another category for which Mozambique was clearly rated best of the three destinations – an overall score of 4.32 compared to 4.16 for Turkey and 3.96 for Lebanon. Indeed, for four of the five constituent elements, Mozambique received the highest ratings – the one exception being a *very clean environment* (4.03), a little lower than the rating of 4.06 for

Turkey. This category, along with natural and cultural resources (4.33) was the one for which Mozambique had the highest ratings.

While each of the destinations had similar ratings for *friendly local people,* Mozambique was rated significantly higher than the other destinations for *a relaxing environment* (4.35), *very safe and secure* (4.44) and for *a lively environment* (4.30).

Not surprisingly, of the three destinations, Lebanon had the lowest rating in relation to being *very safe and secure* (3.64)

Of the various elements within this category, overall, *very clean environment* received the lowest ratings – a score of 3.53 for Lebanon, 4.03 for Mozambique and 4.06 for Turkey. The other four elements all had overall ratings well in excess of 4.

Experience

The preceding analyses focused on the visitors being asked the extent to which they agreed or disagreed that the destination offered the stated individual elements of the tourism product, based on their knowledge of the destination. This next section develops this analysis further by asking the visitors to rate a number of specific elements of the tourism offer in each destination, based on their actual visit. A summary of the key findings for each of the destinations is outlined below.

Lebanon

With an overall mean score of 3.97 out of a maximum score of 5, Lebanon equalled Turkey's score and was little higher than Mozambique (3.89). Lebanon's particular strengths were:

⇒ *convenient payment options when purchasing products and services (4.30)*
⇒ *easy to find information about places to visit and things to do (4.15)*
⇒ *a good range of products and services available from local businesses (4.12)*
⇒ *visitors were catered for with a good range of facilities (4.12)*
⇒ *quality of service experienced throughout the trip was high (4.12)*

Lebanon scored 3.93 for *'smartphone apps were available that improve the visit experience'* which was the highest score of the three destinations – 3.70 for Mozambique and 3.57 for Turkey.

Aspects of the experience which could be improved appeared to be:

⇒ *transport links made it easy to get around* – 3.80 being the lowest score of the three destinations
⇒ *I felt safe and secure throughout my trip* – 3.94 compared to 3.96 for Mozambique and 4.11 for Turkey
⇒ *Free wi-fi was generally available* – 3.56 being the lowest score of the three destinations

Mozambique

Although having the lowest overall score for the actual experience of the visit, Mozambique had a number of strengths including:

- ⇒ *free wi-fi was generally available (4.16)*
- ⇒ *information was provided where necessary (4.13)*
- ⇒ *the transport links made it easy to get around (4.08)*

Although not as highly rated as Lebanon, *'convenient payment options for purchasing products and services'* received a relatively high score (4.09).

Interestingly, Mozambique recorded the highest score for *'tourist information centres were available in prominent locations'* (3.99) compared to 3.72 in Lebanon and 3.69 in Turkey, indicating that overall, this was a relatively poorly rated aspect of the tourism product.

In terms of areas for improvement, the following should be considered:

- ⇒ *the quality of service experienced throughout the trip was high (3.63)*
- ⇒ *smartphone apps were available that improve the visit experience (3.70)*
- ⇒ *a good range of products and services were available from local businesses (3.76)*
- ⇒ *easy to find information about places to visit and things to do (3.89)*

Turkey

In terms of the particular strengths of the tourist experience in Turkey, the following were evident:

- ⇒ *the quality of service experienced throughout the trip was high (4.19)*
- ⇒ *easy to find information about places to visit and things to do (4.13).*
- ⇒ *I felt safe and secure throughout my trip (4.11)*

Turkey also received a high score for *'convenient payment options for purchasing products and services' (4.10)* albeit lower than that recorded for Lebanon and similar to that for Mozambique. It also had relatively high score for '*visitors were catered for with a good range of facilities' (4.01)* but again a little behind Lebanon.

With reference to areas for possible improvement, three issues were identified, namely:

- ⇒ *smartphone apps were available that improve the visit experience (3.57)*
- ⇒ *tourist information centres were available in prominent locations (3.69)*
- ⇒ *information was provided where necessary (3.85)*

Measures of favourability

As part of the same evaluation of the performance of the constituent elements of the tourism product, respondents were asked to rate the destinations on four measures of favourability, namely:

- ⇒ overall satisfaction
- ⇒ likelihood to recommend
- ⇒ likelihood to make a return visit
- ⇒ how favourable is their image of the destination

A 10-point scale was applied where 10 was the top score and 1 the minimum score.

There was clear pattern with Mozambique being rated the highest on all four measures (an overall mean score of 8.99), followed by Turkey (8.48) with Lebanon having the lowest mean score (8.12). It is often the case that there is a close correlation between these various measures of favourability with a high level of satisfaction emerging from a favourable image of the destination and resulting in visitors being likely to recommend the destination to others. This is clearly evident from these results.

Of particular interest is the relatively high likelihood of revisiting Mozambique which has been expressed by visitors – a rating of over 9 which exceeds the other three favourability ratings for that destination. However, a destination which receives high favourability ratings does not always attract a high likelihood to revisit because visitors may well decide that having been once to the destination there is no particular need to make a return visit, especially when there is a large portfolio of global destinations to experience.

Overview of the three destinations

Based on this preceding analysis of visitors' opinions of the various constituent elements of the tourism product, the key features of the three destinations can be summarised as follows:

Lebanon

- ⇒ relatively well rated for *cultural and natural attractions* but not as well on *authenticity*
- ⇒ performed well for *leisure activities* but less so on *providing services to tourists*
- ⇒ rated well for *shopping* and for a *good choice of accommodation* but less so for other aspects of the *infrastructure* which supports tourism
- ⇒ low rating on a *very clean environment*
- ⇒ exhibited a number of particular strengths identified by visitors' experience of the destination
- ⇒ lowest ratings on the various *favourability* measures.

Mozambique

- ⇒ of the three destinations, best ratings for *natural* and *cultural attractions*
- ⇒ well rated for the *quality of the food* but relatively low on *providing services to tourists*
- ⇒ rated well for a *good choice of accommodation* and for *value for money*
- ⇒ less well rated for a *well-developed infrastructure*
- ⇒ while some strengths were identified from visitors' experience of the destination, there were also a number of areas where improvements should be considered in developing the tourism offer
- ⇒ consistently highly rated for the various measures of *favourability.*

Turkey

- ⇒ relatively low ratings on *cultural and natural attractions*
- ⇒ well rated on the provision of *services to tourists*
- ⇒ good ratings for *accessibility* and having a *well-developed infrastructure*
- ⇒ rated well for offering a *good choice of accommodation* and *value for money*

- ⇒ relatively good rating for a *very clean environment*
- ⇒ exhibited a mixture of strengths and relative weaknesses in the tourism offer, based on visitors' experience of the destination
- ⇒ behind Mozambique on the various *favourability* measures.

These ratings by international visitors to the three destinations have highlighted aspects which display a considerable amount of similarity in relation to the perceptions of the tourism product. Where there are significant differences, these tend to be a reflection of their different position on the destination lifecycle and/or specific locational or product factors which have an influence on the destination's offer.

Marketing information

The questionnaire also included a number of questions which were designed to provide some insight on the use and effectiveness of the various communication channels which were used by the visitors in planning their holiday to the destination.

As is the case for all destinations, the influence of recommendations by friends or other members of the family who have previously visited the destination is paramount. For Lebanon and Mozambique, over 50% of respondents claimed that this was how they first heard about the destination and for Turkey, the comparable figure was around 40%. In this digital age, conversations and information presented through social media channels performs a similar role and for Turkey, over 20% of respondents highlighted this channel of communication. Using the online search facility on the Internet was also a relatively important channel for Turkey at just under 20%.

For Lebanon, coverage on television was relatively important, mentioned by just under 20% of respondents and for Mozambique, over 20% cited 'other communication channels'

In response to a question on how easy it was to access information about the destination, the majority of respondents in each destination considered that it was relatively easy to find the available information. However, for each of the three destinations, the dominant response was that it was *easy to do so* rather than selecting the answer option of *very easy to do so*. This was particularly the case for Mozambique with over 50% selecting the *easy* option compared to less than 20% stating that it was *very easy*. For Turkey, the comparable figures were just under 50% and 40% indicating that securing information on Turkey as a holiday destination was relatively easy. The position for Lebanon was more in line with that for Turkey but with a lower proportion of visitors stating that the information was *very easy* to access (just over 30%).

Through the use of social media, communication of and feedback about a holiday destination is now more likely to be 'in the moment'. The majority of visitors in each destination used social media to communicate their experiences of the destination – around 90% in Turkey, 80% in Lebanon and 70% in Mozambique. Facebook and Instagram were the two main platforms used with less than 5% using Twitter:

- ⇒ Facebook (42%) was dominant for visitors to Turkey with 19% using Instagram
- ⇒ Both Instagram (38%) and Facebook (36%) had a similar level of use for visitors to Lebanon

⇒ Similarly, in Mozambique, Facebook (32%) and Instagram (32%) had similar levels of use.

Booking patterns

In both Lebanon and Mozambique, two thirds of visitors had booked their holiday independently. In contrast, visitors to Turkey were equally divided between those who had booked independently (47%) and those who had purchased a package holiday (50%). As with other analysis, this variation is undoubtedly a reflection of the fact that the volumes of visitors to Turkey are significantly higher than the other two destinations, with the resultant availability of a greater number of package holiday offers. This finding is reinforced by the fact that there was a much higher level of use of travel agents for booking package holidays in Turkey than was the case in the other two destinations.

Decision drivers

The survey included a question which asked the respondents to identify, from a list of factors, which of them had contributed most to their decision to visit the destination of their choice. The key decision drivers for each of the destinations are outlined below:

Turkey

Compared to the other two destinations, a number of factors appeared to have an important role to play in visitors' decision to choose Turkey for a holiday. The *price of the holiday* and *weather at the destination* were particularly significant and related to price, the *availability of promotional offers* was also important. Relative to the other destinations, the decision to visit Turkey was also influenced by *recommendations from friends and relatives* and *online reviews* – both factors which would reflect the higher volumes of visitors to Turkey and so, the greater the likelihood that a potential visitor would know someone who had been previously.

Other factors which were considered as decision drivers for Turkey were a feeling of *being safe in the destination* and *convenient flight connections.*

Mozambique

Although not as important as decision drivers in comparison to Turkey, there were a number of factors which were more influential in the decision to visit Mozambique than was evident for visits to Lebanon, namely:

⇒ the price of the holiday
⇒ convenient flight connections
⇒ being safe in the destination.

Lebanon

Of the various factors, the most significant ones for Lebanon were the *weather in the destination* and *recommendations from friends and relatives.*

For a number of the factors, there were no significant differences between the three destinations in their relative importance in influencing the decision to visit including *ease of booking*, *the language spoken, the length of flight* and *the ease of access.*

Support for Local Businesses

A question was included within the survey with the intention of establishing the extent to which visitors felt that they had the opportunity of engaging with local businesses at the destination and experiencing, to some degree, the local culture and traditions.

In both Lebanon and Turkey, the majority of respondents believed that there was some degree of engagement with local businesses, traditions and culture, slightly more so in Turkey where just over 40% claimed that this engagement was fully embedded at the destination compared to around a third of respondents in Lebanon.

This was not the case in Mozambique where the largest group of respondents, almost 50%, stated that this engagement with the local business and people was not readily available but could be accessed if they requested such an opportunity.

Qualitative Findings

The findings from the programme of semi-structured interviews conducted with a sample of key stakeholders in each of the three destinations are outlined in the following section for each of the destinations in turn. These findings have been presented according to the thematic areas such as *Performance of the Tourism Industry*, *Tourism Planning and Development* and *Tourism Marketing*.

Lebanon

Performance of the Tourism Industry

Informants stated that Tourism remains one of the main pillars in the Lebanese economy, accounting for more than 19% of GDP. The improving political stability in Lebanon and the region has contributed to the recovery of the Lebanese tourism industry. Informants made reference to the tourism statistics and stated that in year 2017, following the start of the Syrian crisis in 2011, airport passengers reached its highest level with 8.23M passengers in the last decade. Informants also stated that tourist arrivals reached their highest level since 2011 with 1.85M tourists visiting the country, revealing a 10% yearly increase.

Government representatives indicated that for the sixth consecutive year, European tourists constituted the majority of tourist arrivals. French tourists provided the largest share of European tourists at 27%, a 13% to 169,787 visitors. The number of visitors from Germany, the United Kingdom and Sweden also saw respective yearly improvements of 13%, 13% and 15% year-on-year to 70,045, 98,914 and 39,864 visitors respectively in 2017.

The country was considered to have a number of key features as the basis of its tourism industry. In 2016, Beirut was voted as the Best International City for food in the world. It also topped the list as one of the best 25 cities in the World for its unique beaches and resorts in 2013. Lebanon is considered to have a unique landscape, a natural heritage and a mild climate that distinguishes it from all the neighbouring countries). It can also offer a highly skilled and competitive labour force with many universities offering tourism and hospitality management programs. The Investment Development Authority of Lebanon (IDAL) provides investment for projects in the tourism sector (from hotels, to leisure parks, to medical centers) with exemptions from corporate income tax which can amount to 100% for a period of 10 years if certain employment or investment requirements are met.

It was recognised that the Lebanon tourism industry has a diversified product portfolio. This portfolio includes Lebanon's cultural heritage, combined with its many historical and religious sites; cultural, wellness, ecotourism and religious tourism. In addition, informants stated that leisure tourism continues to have the highest market share although business, ecotourism and health tourism in Lebanon are on the increase.

Despite these signs of recovery and promising developments, Lebanon is affected negatively by the political instability in the region and particularly by the news circulated in the international media. In particular, European visitors' perceptions of safety and security are harmed by the negative publicity in the Western media.

Tourism Planning and Development

It was evident that the Lebanese government, in particular the Ministry of Tourism, has been trying to establish a clear strategy and set a clear vision for the development of the tourism industry. A Tourism Master Plan was prepared in 1997 with the UNWTO, containing 72 priority actions and setting a national strategy for tourism development. An Inter-Ministerial Council for Tourism Development exists, chaired by the Prime Minister, with ad hoc membership and irregular meetings to discuss various policy issues related to tourism.

When informants were questioned about the government policy on tourism development, it became apparent that the country is now targeting high spending travellers, in particular young travellers who would like to experience the diversified tourism product and experience in Lebanon. However, informants also cautioned that the development of tourism industry targeting Western travellers is vulnerable and subject to fluctuations due to political instability and travellers' perceptions of safety in the region.

There was also a belief that the tourism industry of Lebanon suffers from the absence of a national vision, an underdeveloped infrastructure, as well as a lack of a comprehensive strategy that would encourage the participation of different stakeholders into the development of tourism industry. For example, there are several important players in the tourism industry including the Association of Hotel Owners, the Association of the Furnished Apartment Owners, the Association of Touristic Seaside Resorts, the Association of Restaurant Owners (which includes owners of cafés, nightclubs and pastries), the Association of Travel and Tourist Agents (ATTAL) and the Tourist Guide Association. However, informants stated that even although all these associations are involved in tourism governance and planning for tourism development their actions are very limited. The reasons stated for this were their lack of clear vision and capability and more importantly administrative procedures which were imposed upon them, preventing their ability to contribute to the tourism development of the country.

When asked how different stakeholders, including the private sector and local communities are involved in the tourism governance, informants claimed that those in the private sector and community are involved in the tourism governance through projects and actions planned by non-governmental organizations (NGOs) and associations supported by international funds. Informants elaborated on the international benchmarks and international community involvement by stating that UN World Tourism Organization (UNWTO) has disseminated a framework strategy for developing the tourism sector in Lebanon. This strategy identified several pillars for success; the development of new products and diversified services, the participation of local communities and tourism developers, environmental conservation and the promotion of tourist awareness and marketing strategies based on the comparative tourism advantages of Lebanon. These pillars suggest a clear travel of direction for tourism development and establish a benchmark to measure success in the tourism industry of Lebanon.

When the informants were questioned about the possible challenges, it was considered that political instability both in the country and in the region is the major challenge faced by the tourism industry. In addition, it was recognised that it would be challenging to develop the tourism industry without compromising the environmental quality and natural resources. Informants cautioned that the development of tourism industry is highly dependent upon the environment and water quality and, enhancing the landscape and cultural heritage sites. Moreover, informants stated that the national strategy for the development of tourism should be revisited to encourage various forms of nature- based tourism, as well as environmentally friendly accommodation. Added to these, informants shared the opinion that the government should encourage rural-based tourism; an area which government and the private sectors have been proactively working to develop further in order to diversify the tourism product of Lebanon.

Tourism Marketing

When informants were asked about marketing Lebanon as a destination, a general complaint was the lack of public budget invested in the promotion of Lebanon as a major tourist destination. Informants elaborated on this and stated that the budget of the Ministry of Tourism is very limited compared to neighbouring countries. It was stated that the budget is around 1-2 per cent of the total Lebanese public budget and the marketing function takes up a major portion of the Tourism Budget. However, this allocated amount is still small when compared with other tourist destination countries in the region.

Overall marketing of the destination is being handled by the Ministry of Tourism. Planning, development including marketing activities are centralized. There appears to be no destination marketing committees and, commissions. In addition, there is no Marketing Organisation (MO) and legislative framework the MO's are working under and what auditing and control mechanisms that are in place. Incentives are not coordinated at the national level.

When asked about the specific marketing activities to promote Lebanon as a destination, it was stated that the Ministry of Tourism takes part every year along with several travel agencies and Lebanese hotels, in the main international travel fairs, including the ITB in Berlin, the Arabian Travel Market (ATM) in Dubai, and the World Travel Market (WTM) in London, trying to promote and establish Lebanon on the international travel map. Tourism is also promoted through the editions of brochures and seminars both internationally and nationally. As a consequence, ecotourism, nature tourism and rural tourism are expanding in Lebanon.

Lebanon ran a 'Visit Lebanon' campaign recently. Informants stated that this marketing campaign resulted in "94% of hosted buyers expressing their willingness to program Lebanon on their next destination list in the next year; almost 33% of them immediately, and 23% in the next six months and 20% within the next three months". However, informants also stated that non-competitive flight and accommodation prices as well as a higher cost of living compared to destinations such as Istanbul, Turkey, have played a role in deterring potential visitors.

When informants were asked about the role of social media in marketing, it was stated that there was no systematic and professional approach to social media marketing. When different sectors of the tourism industry were compared, it was stated that hoteliers use social media especially for the management of tourism crises, as an effective communication tool both during and following a crisis. Social media is mostly seen as a marketing element and thus assigned marketing missions (promotion, customer relationship, advertising). On the other hand, it is felt that other tourism stakeholders such as travel agents, government and public organisations responsible for marketing of the destination do not use social media as much as they could. When the reasons for this were explored, it was found that there was an absence of perceived benefits from social media marketing, a lack of support from owners or organizational decision-makers and a lack of flexibility within the organization towards change. It was stated that there should be a consistency of presence and message across social media platforms in the effective implementation of a social media marketing campaign. Factors such as negative customer feedback, intra-organizational power struggles and the lack of a clear strategy hinder the organisations ability to run effective social media marketing.

Mozambique

Performance of the Tourism Industry

Mozambique remains in the early stages of its development as a tourism destination and its product base remains largely underdeveloped. Informants stated that, there are projections indicating that the region will attract 36 million tourists by 2020. The interviews revealed a belief that Mozambican tourism potential is largely untapped and investments in infrastructure, human resources and health and hygiene conditions are required. Such developments would enhance the competitiveness of the tourism industry.

When informants were asked about the main strengths of the tourism industry, it became apparent that Mozambican competitiveness is mainly dependent on its natural resources and its very open visa policy. Although there is still no natural attraction on the UNESCO World Heritage list, Mozambique has plans to exploit its natural resources, from safari parks to beaches and unspoilt islands for tourism development.

The tourism industry remains concentrated in the capital city of Maputo, where visitor arrivals account for approximately 60 percent of the total market share. The 40 percent balance is shared across the remaining ten provinces.

The major challenge limiting the opportunities for growth is the lack of political will/intent/vision, political stability in and around the country, the continuation and stability of governments and lack of strategic / long term thinking. Another important challenge is the lack of infrastructure, in particular roads for visitors to travel.

When informants were asked how the tourism industry could be improved and developed further, there was a shared view that the country needs to pay particular attention to new product development (other than sun and sea), infrastructure provision to facilitate access, marketing, attracting investment, conservation of both natural and cultural heritage and human resource development.

Tourism Planning and Development

As an economic sector, tourism could play an instrumental role in the economic growth and employment creation. However, the findings of the study showed that the development of Mozambique as a tourist destination could be better managed in a more strategic and sustainable way. Informants stated that the strategy does not filter down to the local community and local businesses. In particular, there are fundamental problems with the implementation of tourism master plans due to a lack of understanding and communication among stakeholders and lack of sufficient human capital in the country.

Although dominated by the public sector, there is a genuine effort to facilitate an inclusive dialogue between various stakeholders, including public and private sectors, NGOs and local communities. The informants shared the opinion that the country needs a stronger institutional framework, planning and control mechanisms and more active participation of different stakeholders in the creation of an enabling environment for the development of tourism. The informants also expressed a view that the private sector could be recognised as the driving force in the development of the tourism sector when it comes to promotion, investment and development of entrepreneurial activities, ie new product development in tourism.

When informants were asked to elaborate on the lack of political intent to develop the tourism industry, it was stated that there is a need to integrate tourism into the overall development policy, planning and strategy of the country. There could be stronger planning and coordination of tourism markets, products and tourism infrastructure at national, provincial and district levels. Informants went further and stated that a lack of standards and quality in tourism is a major challenge in the country. When asked what could be done, they stated that government could take more responsibility at national, provincial and district levels to set and monitor standards for the development and quality of tourism. Establishing and enhancing 'quality for tourism' requires creating awareness about the importance of tourism among various stakeholders; promotion of tourism among community representatives through their involvement in development programs and training and skill development at various skill levels across the tourism industry.

During the interviews, it was stated that tourism objectives are established to balance economic interests with socio-cultural and environmental considerations. The overall objectives of the tourism policy are: to develop and position Mozambique as a world-class tourism destination; to contribute to employment creation, economic growth and poverty alleviation; to develop sustainable and responsible tourism; to participate in the conservation and protection of biodiversity; to preserve cultural values and national pride; and to enhance the quality of life for all the people of Mozambique.

Informants stated that the achievement of these objectives depends on the implementation of integrated planning and a participative approach to tourism development. The Government seems to be in favour of decentralized planning procedures for tourism development that will lead to the effective integration of tourism in overall plans. However, informants claimed that this has proven difficult because the complex dynamics and political power struggles both within the wider political system and within the tourism sector of the country.

Government representatives who participated in the study stated that central to the future growth of tourism in Mozambique is the structure of the sector. This encompasses community involvement, employment of nationals across different professional levels, investment opportunities for national investors and education and training programs geared towards human resource development. Therefore, the Government intends to promote an increased participation of Mozambicans in tourism as employees, investors, operators and service providers.

Tourism Marketing

Informants shared the opinion that marketing is a complex process that must be undertaken as a parallel process to product development. Informants stated that there is a strong need to identify product opportunities and market requirements of the country first and develop market positioning strategies accordingly. New tourism product development strategies should be developed in order to effectively allocate resources.

The key product opportunities for Mozambique identified by the informants are: sun, sand and sea; water-sports; eco-tourism; adventure; culture; entertainment and trade and investment. It was stated that these products are based upon three broad themes: Water-based tourism experiences; Nature based tourism experiences; and People and urban environment-based experiences.

Informants indicated that these themes could provide the platform for product development and national tourism marketing. When informants were asked to elaborate on this, informants stated that these themes could be integrated into the marketing communication messages/contents and could be conveyed through different marketing channels. However, in order to meet the expectations created through different marketing channels and compete internationally, Mozambique must upgrade its current provision of products and services in terms of quality and aim new product development at international standards.

To position Mozambique as a one of the top tourism destinations in the world, major efforts should be focused towards the development of effective destination marketing strategies in domestic, regional and international markets. As it stands, the approach to destination marketing has been ad hoc, even though there is evidence of e-marketing and social media playing an instrumental role in promoting the country. In particular, the younger generation takes the initiative to promote the country through various channels and platforms.

There was a consensus among the informants that in association with improved product and infrastructure provision, the marketing efforts could emphasize the position of Mozambique as an accessible, exciting, exotic and warm and hospitable destination offering a bunch of differentiated experiences. In addition to these, Mozambique could market its highly valued natural resources, engaging leisure environments, a rich and diverse culture and history as well as friendly people.

There is however limited funding for marketing and promotion and this limited funding could be better used with clearly defined products and themes, targeting clearly defined market segments. Marketing messages could also be better aligned with the clearly identified products and themes. In addition to these, informants indicated that there should be clearly identified key performance indicators set to measure the success of tourism planning and marketing efforts.

Turkey

Performance of the Tourism Industry

Turkey as a tourism destination is one of the leading countries in global tourism. Informants made reference to the United Nations World Tourism Organization data and stated that Turkey, hosted 39.9 million tourists in 2017; in terms of tourist volumes, it is the sixth most visited country in the world. Informants commented on the Turkey's Tourism Strategy 2023 which was launched in 2007 stating that Turkey targets to accommodate 63 million tourists by 2023.

When informants were asked about the strengths of Turkish tourism industry were identified:

a) Cultural richness presented to tourists as a result of hosting many cultural events throughout history
b) Having various types of climate
c) Being one of the most important destinations in the world in terms of sea, sand and sun
d) Having unique opportunities and facilities in terms of various alternative tourism types (health and thermal tourism, congress and fair tourism, winter tourism, golf tourism, water-based tourism etc.)
e) Having a young and dynamic population
f) Hospitality of the Turkish people

When informants were asked to comment on Turkey's Tourism Strategy, a number of interesting issues emerged. According to this strategy, every specific destination will create its own brand. In addition to the branding of the country, branding of every destination will be ensured and the promotional and marketing activities of destinations will be featured separately. In these activities, products for the target audience will be brought to the forefront,

Turkey's differences relative to its competitors in Mediterranean Region will be highlighted, and campaigns within the scope of public relations activities will be undertaken, Turkey's share of global tourism will be further promoted through sustainable tourism products, attracting tourists in the upper income groups through the diversification of tourism products and a focus on promoting Turkey within the Asia Pacific region, especially China and India. With the implementation of these tourism policies, the aim is to increase the volume of visitors into the top 5 countries within the world's tourism industry.

Informants were also asked to evaluate whether the targets for this strategy have been met to date. They stated that according to the figures available, the figures targeted especially in terms of number of tourists and total tourism income will be reached. Some negative developments experienced in Turkey (terrorism, Russian plane crash in November 2015, the coup attempt occurred in August 2016, etc.) have created some deviation in the targeted figures set out in the strategy. However, it is still anticipated that by 2023, the number of targeted tourists and tourism revenue will be reached.

When informants were asked about the possible factors which could affect the growth of Tourism industry in Turkey, three important factors emerged. These were political instability in Middle East and therefore travellers' perceptions of risk and safety in this region; terrorism in Turkey and the lack of effective implementation of tourism policies.

Tourism Planning and Development

Turkey's Tourism Strategy 2023 has been prepared by the Ministry of Culture and Tourism. When informants asked where the responsibility lies with the implementation it was stated that the Ministry of Culture and Tourism is responsible for the execution and implementation of the strategy.

When informants were asked about the main objective(s) of Turkey's Tourism Strategy 2023, it was stated that Turkey wants to make tourism the leading industry for regional development and also for the enhancement of employment by adopting a sustainable tourism approach. In addition, it was stated that Turkey wants to be an international brand in tourism and be one of the top five tourism destinations in the world in terms of number of tourists and the tourism revenues.

When informants were asked about what Turkey is doing towards the achievement of this strategic goal, it was stated that strategies and sub targets are put forward in relation to planning, investment, organization, domestic tourism, research and development, strengthening of transportation and infrastructure, promotion and marketing, education, quality of service, branding, diversification of tourism, rehabilitation of current tourism areas, tourism development regions, tourism development corridors, tourism cities, eco-tourism regions. It is also believed that development of regional destinations instead of point-to-point locations and the establishment of tourism corridors, the development of new tourism destinations, the establishment of new airports, development of highways and railways with high-speed rail lines and the creation of new marinas and cruise ports will lead to the successful implementation of this strategy.

The informants cautioned that tourism development in Turkey cannot be sufficiently coordinated solely by the Ministry of Culture and Tourism. There is strong evidence of the lack of co-operation between the public and private sectors. It was stated that the current policies of the Ministry of Culture and Tourism do not match with the dynamics of the sector.

In order to establish a strong basis for collaboration and mutual understanding, the 3rd Tourism Council was organized. Informants shared the view that this was an excellent platform for the council, public, private, higher education and community representatives to come together, develop policies and action plans towards the achievements of 2023 targets. The recent appointment of a new Tourism Minister with a tourism background is believed to further strengthen the private-public sector partnership in Turkey. Informants believe that the dynamics of the tourism sector will have a higher profile in all decisions to be implemented.

Informants also believe that stakeholders in the tourism sector in Turkey do communicate and cooperate with each other. For example, for the marketing of the destinations, travel agencies and hotels share duties and responsibilities, periodically hold meetings and evaluate the tourism sector. However, in the development of tourism marketing and the tourism sector, public sector organisations and private sector companies are not considered to be equal. The development and implementation of tourism policies are carried out by the Ministry of Culture and Tourism and for this reason, the public sector tends to play the leading role. Private sector companies comply with the policies and practices that the ministry has implemented. Moreover, the Ministry of Culture and Tourism also strengthens transportation and infrastructure services for the development of regional destinations, making contributions to attract more tourists to the region by leading the opening of new airports. In order to gain a greater share from the international tourism market, the Tourism Ministry conducts negotiations to increase the budget allocated for promotional and marketing activities and as a result of these negotiations, the Ministry has managed to increase its budget each year.

When informants asked about the role of local communities in tourism planning and development, informants stated that local communities should be more involved. Informants indicated that local communities are not involved in the development of these policies because the Ministry of Culture and Tourism is seen as having competence in this area. However, local communities are important in the development of tourism policies because the labour needed to service the tourist is provided by the local, the services offered to the tourists have local characteristics, the products used by the facilities are supplied locally and local people best reflect the culture and traditions of Turkey.

When informants asked how local communities respond to the tourism development in Turkey, there was a belief that tourism development was considered to be a positive because through tourism investments made in their regions, there are more employment opportunities and local people also are able to sell their products and services to tourists.

Tourism Marketing

Regarding market research, the Ministry of Culture and Tourism is cooperating with the private sector in order to identify the important markets for the tourism sector. Private sector representatives such as the association of accommodation establishments, travel agencies, airlines, Association of Turkish Travel Agencies (TÜRSAB) and the Ministry of Culture and Tourism are acting as partners in the promotion and marketing of destinations. To attract more tourists to Turkey, they ensure participation in international tourism fairs, promote destinations, publish various commercial films and make sponsorship agreements. The cost of promotional commercial films is supported by the Ministry's budget. In addition, stand leasing and stand opening procedures at international tourism fairs are usually undertaken by the Ministry of Culture and Tourism. Private sector representatives do not allocate a separate budget for this lease. This allows private sector representatives to use their own budgets for marketing more efficiently and more effectively.

Informants stated that there are no Destination Management Organizations (DMO's) in Turkey. Therefore, they could not give any examples of successful and unsuccessful marketing activities of DMO's. At the 3rd Tourism Council held in November 2017 under the leadership of the Ministry of Culture and Tourism, however, recommendations were made about the establishment of destination management organizations and the marketing of destinations performed by these organizations. Informants indicated that at present, the Ministry of Culture and Tourism is the sole authority responsible for the marketing of destinations. The Ministry shares all of its activities and organizations with public agencies and private sector representatives in a transparent manner.

The budget and funds of the Ministry of Culture and Tourism are being sent to The Grand National Assembly of Turkey (TBMM) every year in October as a part of central government budget process. The budget and funds are approved by Members of Parliament and the budget allocated for that year is determined. Under this budget allocation, the Ministry publishes books and brochures, participates in international tourism fairs abroad and makes advertising campaigns for promoting Turkey.

When asked how the success of marketing activities is measured, it was stated that this is done by identifying the number of tourists visiting Turkey each year and total tourism revenue. Any increase or decrease in these figures can be observed by referencing reports published by Turkish Statistical Institute (TÜİK) on a monthly and annual basis. Marketing strategies and plans are developed according to the statistics and market intelligence gathered about different target markets. In addition, global tourism trends, global tourism statistics and the demographic profiles of the countries that generate the highest number of tourists in the world are examined and analysed. Based on these analyses, tourism strategies and plans are developed. As a result of these analyses, the year 2018 has been declared as Turkey tourism year in China.

When informants were asked what else could be done in order to market Turkey more effectively, a number, a number of interesting recommendations emerged.

The informants shared the view that a more strategic and integrated approach to marketing should be taken by the public sector in collaboration with the private sector. Turkey as a whole should be re-assessed/evaluated with its tourism products in order to demonstrate this diversity in the promotional and marketing activities when different and fragmented market segment are targeted. There should be a smooth, transparent and effective information flow among different stakeholders including public, private sectors, NGOs and communities in order to develop effective and meaningful marketing plans by taking into consideration the distinct characteristics of Turkey's tourism products. In this regard, informants believe that the key messages to convey through Turkey Destination Branding is Turkish people and their hospitality. More emphasis should be placed on Turkish people and their hospitality in marketing and branding activities and attempts.

Informants also believe that individual destinations' brands created within Turkey should support the overall 'Turkey Tourism Destination' brand. What was also interesting and worth noting was a recommendation made by the informants about the promotion and marketing strategies of Turkey. Informants shared the opinion that these should be informed and shaped by the experience and expectations of the various tourism target markets. It was also stated that each destination in Turkey should consider which target market to target, which tourism products to promote and which marketing techniques to use.

In terms of potential target markets, the Russian Federation, Ukraine, Central Asia, Malaysia, Indonesia, China and India have been identified as markets with potential. Informants believed that more market research needs to be undertaken in these markets in order to understand different market segments within these countries and their expectations. The marketing strategies of the competitive countries targeting similar market segments should be carefully analysed and informed decisions should be taken whilst developing the marketing strategies.

Informants also felt that Turkey could develop different marketing strategies/tactics for different tourism products and experiences. In other words, in target markets marketing should be more 'product oriented'.

Informants felt that to increase the brand value and also to achieve the brand differentiation, Turkey should put 'human capital' at the centre of visitor experience and empower and train local communities about tourism and culture in order to enhance tourist experience. More effort should be geared towards experiential marketing and tourists should be well informed about the possible experience, tourism products and services before, during and after the experience. Story telling about the destinations should be encouraged, developed and supported. These activities should be supported by technology in order to create a 'memorable experience' among the visitors. This could also help to increase the number of repeat visitors. Informants also suggested that there should be a Tourism Information System in order to help tourists find the information that they seek during the different stages of their travel experience.

Given the importance of cinema and films/movies in promotion and marketing of a country, this should be recognised and supported as a strategic sector by the government. Informants shared the opinion that Tourism and Culture Ministry should establish a 'Movie Tourism Commission' with the authority/responsibility for determining how different movies could be used for different marketing communication purposes in different countries. In order to support all these activities, more research should be conducted into the impact and influence of Turkish movies in different markets. As part of the movie tourism initiative, Turkish Government could set up studios in different tourism destinations in order to support the infrastructure for film production.

When informants were asked about Turkey Home tourism campaign, positive comments were expressed. However, informants also stated that this campaign should be revisited in order to identify its strengths and weaknesses.

Informants think that digital and technology-based marketing should be integrated with/embedded within the tourism marketing strategy. However, it has to be 'destination based/oriented'. Each destination's target market should be clearly identified and market trends should be closely monitored by making good use of 'big data'. The content of marketing communications, including websites and social media channels should be presented in different languages including Chinese, Arabic and Urdu.

When informants were asked to elaborate on what else could be done with regards to the better use of social media, it was stated that other destinations could also benefit from social media and online platforms similar to HowtoIstanbul and oneistanbul. A similar approach/strategy could be utilized with partnerships in the relevant target markets and should be supported by digital marketing and social media activities.

When forming and visualizing the social media and digital marketing contents, each destination's distinctive characteristics, interesting and mysterious aspects should be identified. These eye-catching and mysterious aspects of the destinations could make the potential visitors feel what they ought to experience and excite them even before they visit the destination.

UNESCO Smart and Creative City concepts could be utilized further with the involvement of local authorities. Innovative projects could be developed at the local level in order to support the development of Smart and Creative Cities. There were informants who also said that international projects could also be developed in collaboration with other cities and destinations and their civic societies could get involved in the development of Smart and Creative City Concepts.

Informants also emphasized the importance of organizing cultural, art and sport organizations both in the country and overseas in order to convey 'thematic and promotional messages' about the country. These activities could be shared on the Ministry's website and updated on regular basis. Associated with these, Turkey could support its internationally known artists, actors, poets and actresses to make visits and representations in different markets. Exhibitions could be encouraged and supported both in the county (by international artists, authors and poets) and overseas by the local artists, authors and poets.

Informants also highlighted the importance of identifying and working with internationally known 'ambassadors' (such as famous movie stars, footballers, basketball players) in marketing and promoting the tourism industry of Turkey. These can be the public faces of the country in Turkey's attempts to market its destinations.

Informants also felt that given the current economic and political instability globally, and in the region, the Turkish tourism industry needs to develop effective crisis management strategies and learn to mitigate the 'negative impacts' of political and economic instability by using the marketing communication channels effectively. Besides representations at exhibitions, fairs and visits made by the private and public sectors in different countries to help with the negative perceptions created by the crises, social media and digital marketing could be used more effectively.

5. POLICY RECOMMENDATIONS

The comprehensive literature review of destination marketing, the case studies and early results from the fieldwork indicate a number of key policy directions to support destination marketing. Policy should:

1. *Be framed with a long-term time horizon, including guaranteed funding for marketing agencies, to build continuity, coherence, certainty, and confidence across the tourism sector.*

   It is essential that policy for destination marketing supports the adoption of a long term, strategic approach: not only do destinations have long product life cycles, but also strategy is needed to provide leadership and a clear direction and coordination for the many stakeholders involved in destination marketing. A strategic approach also recognizes the need for different marketing approaches to be taken at each stage of the destination life cycle.

   Long term guaranteed funding of destination marketing is a critical issue for DMOs. Long term funding certainty can only be provided by a supportive government policy. This is because DMOs cannot earn sufficient revenue from supplementary products such as advertising and booking fees. DMOs therefore are very dependent upon government funding, leaving them at the whim of local politics. For example, in the UK many regional tourism boards had their funding cut as part of public sector austerity measures imposed by the government. This means that the long term funding certainty that is needed for effective destination marketing is absent. In contrast, Canadian policy supports the tourism sector with guaranteed long term, predictable funding streams to build continuity, coherence, certainty, and confidence across the tourism sector.

2. *Be framed to ensure a 'whole of government' approach, where all levels of government are involved in destination marketing, with clear roles, functions, and interactions of key public and private sector stakeholders identified. Here two issues are particular priorities – (i) the relationship between legislation, national policies and programmes, and the functions and activities of local government and destination management organizations (DMOs); and (ii) the need for policy to be joined up across diverse public agencies to conserve natural and cultural heritage as tourism resources.*

   Tourism is a cross-cutting sector involving both different economic sectors and functions of government, and different geographical levels. A whole of government policy approach to tourism is therefore essential to avoid fragmentation and duplication of effort in destination marketing. Typical tensions here include the promotion of tourism in national parks by one agency whilst another agency is charged with conservation in the face of growing tourist numbers. Coordination is also an issue at national, regional and local level where destination marketing at different geographical scales has distinct demands and requires coordination. Effective destination marketing in such a complex system therefore requires that the roles, responsibilities and resource requirements of stakeholders are clearly identified and communicated.

   In Spain for example, there is an uncoordinated policy approach favouring the local level of tourism governance which is allowed to choose its own direction. Canada's approach is preferable, with policy recognizing both the cross-functional and geographic levels of tourism governance. The Canadian federal department leads coordination among federal departments to support a whole-of-government policy approach to the implementation of Canada's destination marketing. It does this through a steering committee which brings together the federal departments and agencies directly implicated in Canada's destination marketing. Similarly in the UK, a whole of government policy approach has been adopted through creation of an overarching industrial strategy involving a number of government departments. This is designed to ensure that departmental action to grow tourism is coordinated. In addition, establishing a clear framework of government support and activity makes it easier for local areas to develop their own strategies to grow tourism.

3. *Be framed to ensure strong dialogue between government, industry, and civil society. Policy should therefore ensure that policy facilitates and supports a partnership approach to destination marketing to both coordinate the process and also ensure that public money is well spent.*

   Destinations comprise of a diverse and eclectic community of individuals, private sector organisations and not-for-profit groups that might or might not actually hold a *legitimate* interest in the marketing of the destination. Ultimately however, all stakeholders are important, regardless of their level of active interest in tourism, and often present a range of challenges for destination marketers. Engaging these stakeholders in a destination marketing dialogue is therefore an essential policy objective.

   A key policy issue for destination marketing therefore is to ensure involvement and commitment by all stakeholders in the strategy and branding process. Here DMOs can be seen as the managers of networks of destination stakeholders who each play a critical role in the marketing and branding of a tourism destination. To avoid destructive destination politics it is therefore vital to be inclusive from the outset. The key policy objective here is to manage the relationship between collaboration and power and to recognise that the views of the local community must be included in destination marketing as destinations are places where people live work and play.

4. *Ensure that ring-fenced resources are provided for DMOs to allow research and knowledge management to underpin a data-driven approach to destination marketing activities, including evaluation against agreed KPIs.*

   Accurate and timely tourism data are essential to help understand the changing visitor, for destination marketing decisions and for the evaluation of marketing spend. Here, policy that supports and funds a knowledge management approach is a vital, yet unusual, step in the development of most tourism DMOs. This approach involves assessing information needs, and then developing and seeking that information to both underpin decisions and to meet strategic priorities. Such a policy approach allows DMOs to take a data-driven approach to marketing.

   This involves firstly, deep and meaningful research as the key to understanding the contemporary tourism consumer and their needs in tourism; it informs the marketer on when and how to intervene in the destination purchasing decision process and also guides them in the co-creation of their destination brands. It also allows for sophisticated approaches to targeting and segmentation. Secondly, evaluation of marketing spend has grown in importance as the accountability of public finances has become an imperative using techniques such return on investment and conversion studies.

The UK is a good example of a data-driven policy approach to destination marketing. Government places a priority on value for money from public spending. As a result tourism marketing has been subject to close scrutiny and clear, transparent key performance indicators (KPIs). Visit Britain has a well-documented and transparent set of KPIs and targets guided by the three key principles of data-driven targeting and prioritisation; alignment with targets and priorities set by the national agencies; and identification and quantification of the trade-offs between different strategic options. Targets are derived from the Oxford Economics' Tourism Decision Metrics model based on historic arrivals. Using these data, forecasts are run and targets are set for investment to deliver incremental spend and visitor growth.

5. *Ensure that policy facilitates and encourages innovation in destination marketing, including prioritizing development of digital marketing.*

The Internet has revolutionised destination marketing, branding and image formation and the rapidly emerging digital economy is challenging the relevance of existing marketing practices. DMOs now use the Internet as a central part of their marketing strategy. Policy should therefore encourage destinations to adopt digital marketing approaches and ensure that their personnel are trained in this new art.

Policy initiatives must recognize that the Internet provides a medium and delivery mechanism for consumers to gather information and to make purchasing decisions. Yet many destinations have been slow to take advantage of the cost savings and potential that the Internet provides, and it is a common criticism that content provision by destinations lags behind the technology available to deliver it. At the same time, social media and the Internet have revolutionised information search for products and increasingly appear in search engines. Social media platforms have emerged as a dominant digital communications channel as tourists increasingly engage with destinations on mobile devices.

In the UK for example, a key element of Visit Britain's marketing is developing a digital strategy. The three-year digital marketing strategy is built on a 'test and learn' philosophy across all content, from tablet user experience to call-to-action copy. That enabled the generation of valuable insights to inform cross-channel investment decisions. The strategy is working towards delivering the most relevant and inspirational content to the right audiences at the right time by using the right channels, and this approach has seen the use of tailored content for diverse audiences, to showcase Britain's and England's tourism offer at home and abroad. The strategy aims to harness the power of digital across the whole customer journey.

Finally, policy should ensure that funding and training is available to allow DMOs to keep up to date with other new innovations in tourism marketing, including new approaches to targeting and segmentation, smart destinations and the role that contemporary development such as climate change will play in destination marketing.

6. *Ensure that policy creates conditions for micro, small and medium-sized suppliers to be competitive.*

   Policy should actively support micro, small and medium-sized suppliers as they form the dominant type of enterprise at any destination. Policy support for this group of enterprises focuses on two key areas. Firstly, micro, small and medium-sized suppliers face competition from multi-national chains at many destinations in terms of price, service quality and innovation. As a result specific policies can be implemented to aid these smaller businesses through tax breaks, investment incentives and grants. Secondly, this tends to be an 'undermanaged' group of businesses often lacking business and hospitality skills, particularly if they set up as 'lifestyle;' businesses. Policy here can assist with training and up-skilling of these smaller businesses as well as helping them to form cooperatives and marketing consortia.

7. *Ensure that policy recognizes and supports festivals and events as key drivers of demand and can help reduce seasonality.*

   Festivals and events are often seen as an afterthought in tourism policy formation. Yet, they are an integral part of any destination marketing strategy as they can (i) influence the type of visitor (for example business events and conferences ensure a higher spending visitor), (ii) act as a significant promotional and profile raising tool where mega-events such as say the Football World Cup, the Olympics or FI Grand Prix are held with the support of government funding, and (iii) actively reduce a destination's reliance on the peak season. In the UK for example, the Blackpool Illuminations event is deliberately timed for the end of the summer school holidays and has successfully extended the resort's tourism season well into the autumn shoulder months.

   Scotland has a coherent national strategy for festivals and events which has boosted visitor numbers. Events have included the Commonwealth Games, the 2014 Ryder Cup, and Homecoming Scotland 2014. Visit Scotland continues to secure, develop and support a portfolio of major events as highly valued attractions and key drivers of demand. Festivals and events have also been identified as a specific priority within the UK's tourism planning.

CONCLUSIONS

Although destination marketing is a relatively young discipline, having developed since the 1970s, the literature review in this report has identified five key components of a successful strategy:

- ⇒ Competitiveness
- ⇒ The role and influence of DMOs
- ⇒ Destination market planning
- ⇒ Destination market funding
- ⇒ Cross-cutting issues; the role and influence of
    - Technology
    - Market research
    - Collaboration and governance

The development of an attractive destination brand starts at the national level and the extent to which regional destinations can be created, with a clear brand identity of their own, is dependent on the relationship between federal and local government, establishment of DMOs with a clear plan, investment from private enterprise and a capable and enthusiastic local population. The collaboration between these groups will determine the degree of success achieved.

It is clear from the literature review of what constitutes best practice that good strategic destination marketing plans include the following components:

1. **Adequate budget for advertising and promotion.** There is a direct correlation between spending on advertising and promotion and increases in visitor numbers. The budget available will be dependent on the resources of the relevant Member State and can be calculated based on a percentage of tourism spend or GDP.
2. **Partnerships enable the wider distribution of the marketing messages.** By leveraging the distribution capability of partners (e.g. airlines, global brands, OTAs, etc) a destination can reach a far wider audience for much less investment. The same approach applies to the attraction of sponsorship of events within a destination.
3. **Community involvement underpins and reinforces the marketing message.** Local communities that interact with visitors not only have a closer understanding of what they want, but also have the potential to increase the rate of loyalty (return visits) and to spread the message by word of mouth.
4. **Digitization is critical.** The investment in online platforms to enable potential visitors make bookings and the use of social media to communicate with target markets provides high returns on investment which especially attractive where resources are limited.

The research underpinning the findings in this report has explored the full spectrum from markets with advanced and complex marketing systems at one end of the scale, to those that are far less structured, and also one with significant geo-political challenges.

It is clear that a coherent plan is required at a national level that is backed by government, both in terms of policy and resources. Furthermore, given that investment is often required to improve infrastructure, plans need to be long term with guaranteed funding to provide security and confidence. This can be challenging for the tourism industry, to a greater or lesser extent, depending on the stability of the political landscape.

In addition to the long-term commitment from government, the successful delivery of the strategic plan requires the establishment of Destination Management Organisations that can implement the policies, liaise with private enterprise and the local population. It is the collaboration between these stakeholders, in pursuit of the common aim, that will achieve long-term increases in tourism numbers and revenue.

The 57 members of the OIC cover a wider spectrum of destinations, many of which are at the early stages of destination marketing development. Some are at the growth stage of the marketing life-cycle and a number are trying to develop destination marketing strategies in challenging environments. The analysis of best practice in more developed markets, including Turkey, which is currently achieving success in the in the implementation of its 2023 strategic plan, provides an opportunity for OIC Member States to compare their current approach to destination marketing and develop improved plans for the near and medium term.

This report makes seven policy recommendations which can be adapted for use in any of the OIC Member States. Whilst specific policy recommendations have been tailored to Lebanon, Mozambique and Turkey in detail in the previous section, they can be summarised as follows:

- ⇒ Guarantee funding over the long term
- ⇒ Adopt a whole government approach with intra-governmental cooperation
- ⇒ Create a strong dialogue between government, industry and civil society
- ⇒ Ring-fence resources for DMOs
- ⇒ Encourage innovation and digitization
- ⇒ Create policy that encourages competitiveness amongst suppliers
- ⇒ Support events that drive demand and reduce seasonality amongst visitors

Each Member State should review and adapt the recommendations to their own current economic situation and aim for the future of tourism in its own market. In the Review of OIC Member States the report provides a template for self-assessment which can be used in the development of destination marketing strategies that are relevant to each member state.

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