

DESTINATION MANAGEMENT

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Tourism Destination;

- ▶ Different definitions and approaches..
- ▶ Physical space a tourist spends at least one overnight which includes tourism products; support services and attractions, tourist resources

Physical and administrative boundaries

- A continent
 - A country,
 - A region,
 - A city
 - A center
- ▶ Perceptual boundaries

Basic Elements of Destinations

Destination appeal and experiences offered and shaped by

Attractions

Public
and
Private
Amenities

Accessibility

Image
and
character

Price

Human
Resource

ATTRACTIONS

Built ; e.g. heritage monument, Eiffel tower, religious buildings, sport facilities

Cultural; cultural events, museums, art galleries, theatres

Natural; e.g. Beaches, mountains, parks, weather



AMENITIES

Support the visitors' stay;
Basic Infrastructure



Public transportation Roads



Direct Services

Accommodation Visitor
Information



Catering, guides, recreation
shopping



Accessibility

Should be accessible via;

Air passenger services

Railways



Visa
requirement

Cruise ships



Ports of entry and special
entry conditions

IMAGE AND CHARACTER



Unique image is needed

Various means can be used to promote such as:

- Marketing and branding
- Travel media
- e-marketing



The image includes;

- Uniqueness
- Sights
- Scenes
- Environmental quality
- Safety
- Service levels
- Friendliness of people



Table 3 Dimensions/Attributes determining the perceived destination image

Natural Resources	General Infrastructure	Tourist Infrastructure
Weather Temperature Rainfall Humidity Hours of sunshine Beaches Quality of seawater Sandy or rocky beaches Length of the beaches Overcrowding of beaches Wealth of countryside Protected nature reserves Lakes, mountains, deserts, etc. Variety and uniqueness of flora and fauna	Development and quality of roads, airports and ports Private and public transport facilities Development of health services Development of telecommunications Development of commercial infrastructures Extent of building development	Hotel and self-catering accommodation Number of beds Categories Quality Restaurants Number Categories Quality Bars, discotheques and clubs Ease of access to destination Excursions at the destination Tourist centres Network of tourist information
Tourist Leisure and Recreation Theme parks Entertainment and sports activities Golf, fishing, hunting, skiing, scuba diving, etc. Water parks Zoos Trekking Adventure activities Casinos Night life Shopping	Culture, History & Art Museums, historical buildings, monuments, etc. Festival, concerts, etc. Handicraft Gastronomy Folklore Religion Customs and ways of life	Political & Economic Factors Political stability Political tendencies Economic development Safety Crime rate Terrorist attacks Prices
Natural Environment Beauty of the scenery Attractiveness of the cities and towns Cleanliness Overcrowding Air and noise pollution Traffic congestion	Social Environment Hospitality and friendliness of the local residents Underprivileged and poverty Quality of life Language barriers	Atmosphere of the Place Luxurious Fashionable Place with a good reputation Family-oriented destination Exotic Mystic Relaxing Stressful Fun, enjoyable Pleasant Boring Attractive or interesting

PRICING



Important in **competition**

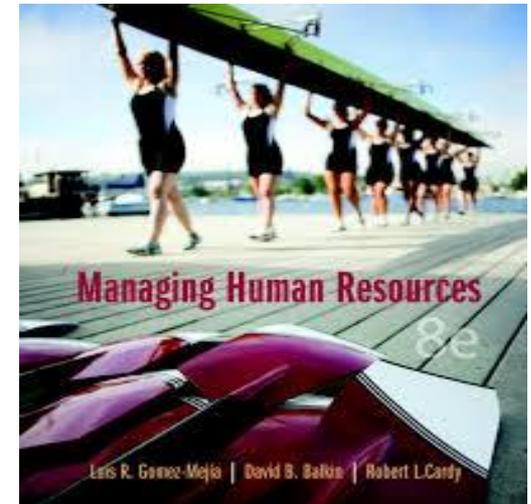
Related to cost of;

- Transport to and from destination,
- Accommodation,
- Attractions,
- Food,
- Tour services



Other economic features
such as currency exchange

HUMAN RESOURCE



Well trained tourism workforce and citizens are indispensable elements of tourism destination delivery and need to be managed in accordance with the destination strategy.

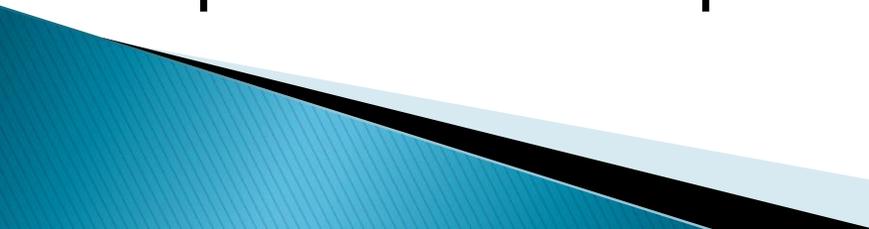
Practice

- ▶ Choose one destination (where you from or one that you can describe best)
- ▶ 5 minutes to prepare and 3 minutes to present your destination which includes:
 - ▶ What are the attractions? (natural, built, cultural)
 - ▶ How are the amenities (basic infrastructure, hotels, visitor info, guides, catering etc.)
 - ▶ How is the accessibility? (road, air, rail, cruise, visa?)
 - ▶ **Human resource?**
 - ▶ **Image?** (how, what media used etc.)
 - ▶ **Price?**

Defining Destination Management (DM)

- ▶ DM is the co-ordinated management of all the elements that make up a destination (attractions, amenities, access, marketing and pricing)
 - ▶ It takes a strategic approach
 - ▶ Joined up management
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Options for DM Governance

- ▶ Dep. of single public authority
 - ▶ Partnership of public authorities, serviced by partners
 - ▶ Partnership of public authorities, serviced by a joint management unit
 - ▶ Public authority(ies) outsourcing delivery to private companies
 - ▶ Public-private partnership for certain functions – often as a non-profit company
 - ▶ Association or company funded purely by a private sector partnership and/or trading
- 

Destinaton Management Organisation (DMO)

- ▶ Destination management calls for a coalition of **many organisations and interests** working towards a **common goal**.
- ▶ DMO's role should be **to lead and coordinate** activities under a coherent strategy

...

- ▶ No control of activities of partners but bring together resources and expertise,
- ▶ DMOs must develop a high skill in developing and managing partnerships.

Beside marketing activities, DMOs to act as a **strategic leader** in destination development:

- **Statistical Strengthening and Development of a Tourism Satellite Account (TSA)**
 - **Product Development and Diversification**
 - **Marketing and Promotion Plan**
 - **Value Chain Analysis and Local Economic Development**
 - **Institutional Strengthening and Public–Private Partnership**
 - **Tourism Legislation and Regulation**
 - **Tourism Physical Planning and Resort Development**
 - **Tourism Development Master Plans and Strategic Development Plans**
 - **Tourism Policy**
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Destination Management Organizations:

- ▶ **National Tourism Authorities (NTAs) or Organisations (NTOs)**
 - ▶ **Regional, provincial or state DMOs (RTOs)**
 - ▶ **Local DMOs**
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Case: New Zealand

- ▶ National Level: New Zealand Tourism
www.newzealand.com/int/
 - ▶ Regional Level: Destination Fiordland
www.fiordland.org.nz/
 - ▶ Local Level: Wellington
www.wellingtonnz.com
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Northwest England: Implementing the tourism strategy

The Northwest Regional Development Agency (NWDA) is responsible for the sustainable economic development and regeneration of England's Northwest. Tourism is a significant sector within the regional economy. NWDA has been given the leading, strategic role in the development of tourism in the region and will deliver the Regional Tourism Strategy through a new support structure which comprises:

- The Visitor Economy Forum who will oversee the development of strategy and the broader regional visitor economy ensuring synergy between regional and sub-regional strategies. A Regional Tourism Management team, chaired by NWDA, consisting of Visit Britain and the five tourist boards is responsible for driving and co-ordinating the operational delivery of the strategy.
- The regional tourism executive group within the NWDA which is responsible for the strategic direction of tourism in the region, providing funding and project management, managing relationships with DMOs and, through its specialist teams, leading developments in ICT, skills, research, regional marketing and business support.
- The five sub-regional Tourist Boards are the DMOs responsible for the tourism management of these areas, including destination marketing, relations with the industry, research, project delivery and leading the delivery of their strategy through the Destination Management Plans that bring together all those involved in tourism and the visitor economy in their sub-region.

Destination Management

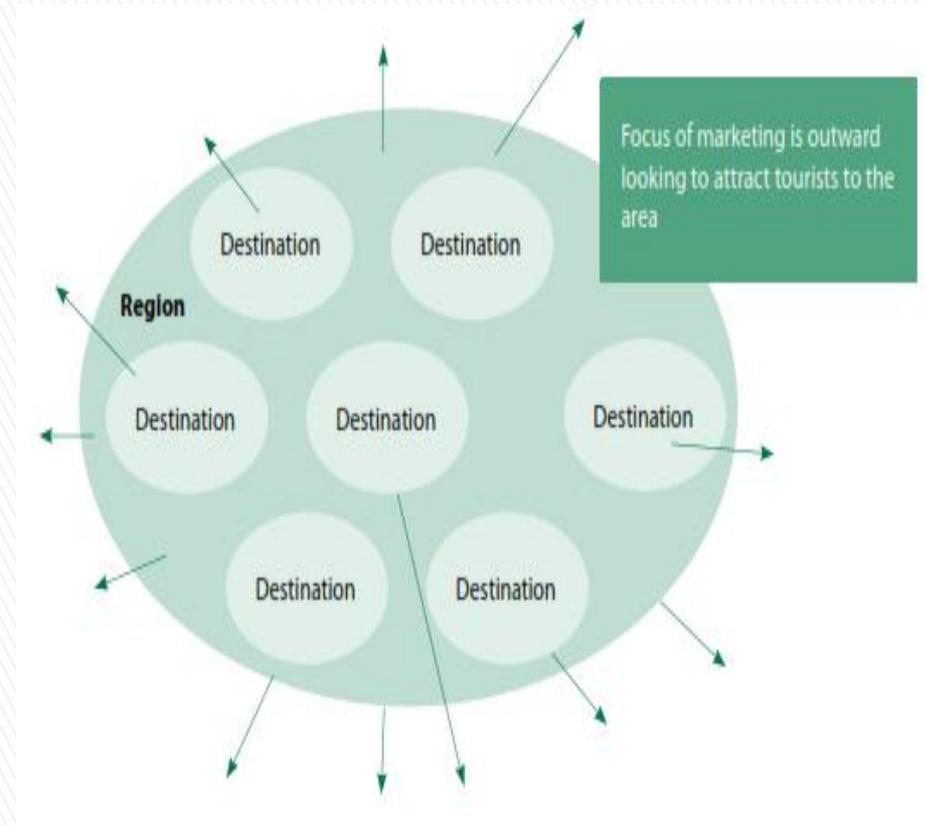


Creating a suitable environment

- ▶ Right social, economic and physical environment:
 - Planning and infrastructure
 - Human resource development
 - Product development
 - Technology and systems development
 - Related industries and procurement
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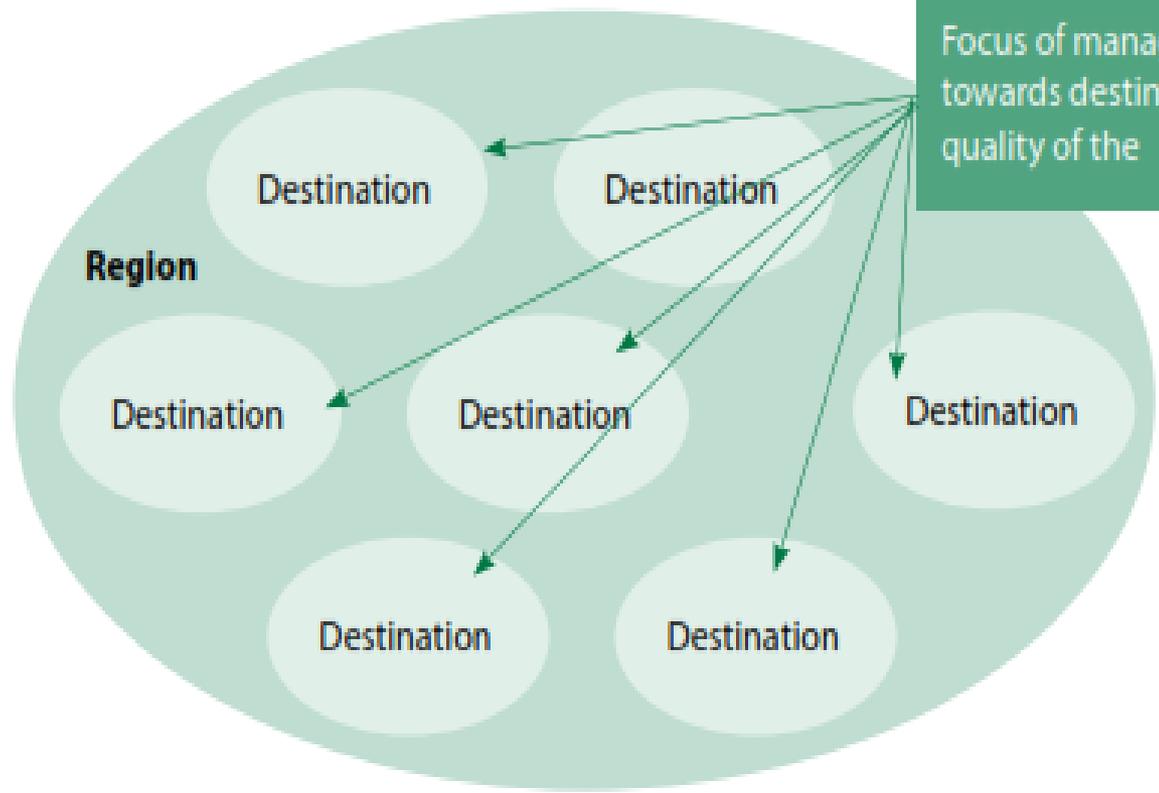
Marketing

- ▶ Promote most attractive. Keys are:
 - Dest. promotion, incl. branding and image
 - Campaigns to drive business esp. SMMEs
 - Unbiased information services
 - Operation/facilitation of booking
 - CRM (Customer Rel.Mng.)



Delivery on the ground

- ▶ Ensure quality of every aspects of visitor's experience:
 - Destination coordination and mng.for visitor "quality of experience"
 - Product "start-ups"
 - Events development and management
 - Attractions development and management
 - Training and education
 - Business advice
 - Strategy, research and development



Focus of management looks inward, towards destination, to ensure the quality of the visitors stay

- ▶ Could there be a destination management beyond the political or administrative boundaries?

Blackstone Valley Tourism Council, Rhode Island, USA

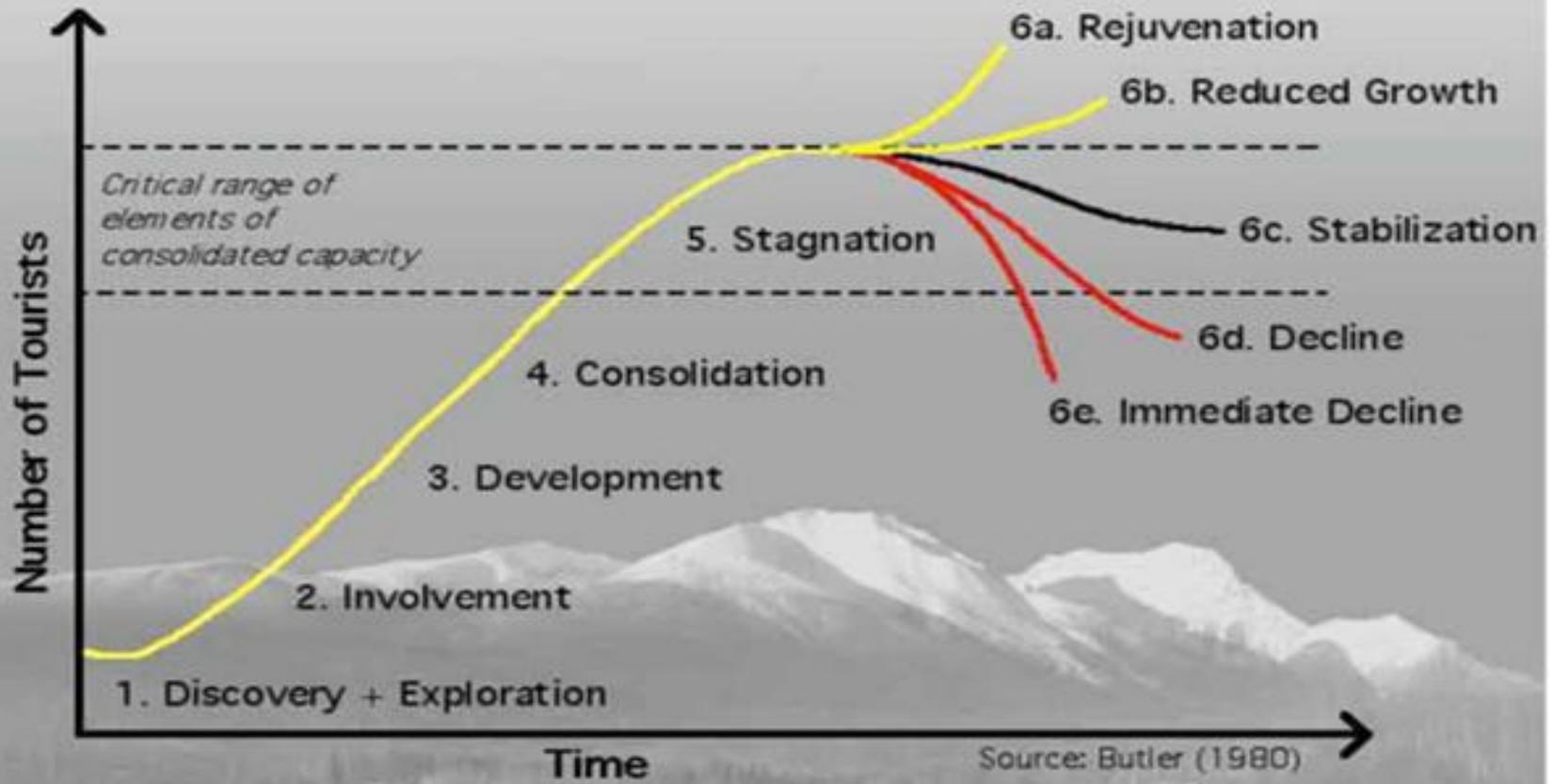
The Blackstone Valley is a river valley, historically significant as the birthplace of the American Industrial revolution. This distinct geographic and heritage area is a designated National Heritage Corridor which comprises of nine different communities. The Blackstone Valley Tourism Council is a non-profit organisation which is responsible for bringing together these communities to develop and co-ordinate sustainable tourism. Blackstone Valley Tourism Council has recently received UNWTO's best Certification for Excellence in Tourism Governance.

See: www.blackstonevalleytourismcouncil.com

Decision Making in Destination Management



Hypothetical Evolution of a Tourist Area



British Seaside Resorts: Demonstrating the destination life cycle

The life cycle of the British coastal resorts began as early as the 1730s, when health theorists suggested the curative powers of drinking and bathing in seawater. Small fishing villages around Britain began to receive visitors 'taking the cure'. The popularity of seaside destinations such as Brighton, Bournemouth, Blackpool and Scarborough grew steadily throughout the 1800s, in step with the UK's developing rail network. By the mid-1900s, the seaside holiday was firmly established in the minds of the British public as the traditional annual holiday and Blackpool, Scarborough, Southend and Brighton consolidated their position as leading resorts.

In the 1960s and 1970s Britain saw the introduction of affordable package tours to developing destinations in the Mediterranean. UK coastal resorts, with their unpredictable weather, cold seas and aging facilities became unfashionable and could not compete with the new markets in the Med. They gradually fell into decline. These resorts are now taking steps to rejuvenate their products by developing facilities for business tourism, conferences and conventions, organising programmes of events or festivals, etc.

Blackpool, for example, though still receiving some 11 million visitors per year, has a resort regeneration programme which has secured £ 62 million (approx US\$ 125.5 million) for the reshaping of the sea wall between north and south piers; £ 14 million (approx US\$ 28 million) for the Central Gateway project which includes recreational spaces and a new hotel; and has established a Tourism Support Bureau to support small businesses, and to improve the accommodation offer.

Sustainable Tourism Development

- ▶ Without proper planning and management tourism;
 - Can damage destination's environment,
 - Cause social and cultural conflict
 - Alienate the communities that host tourism

Sustainable Tourism Development

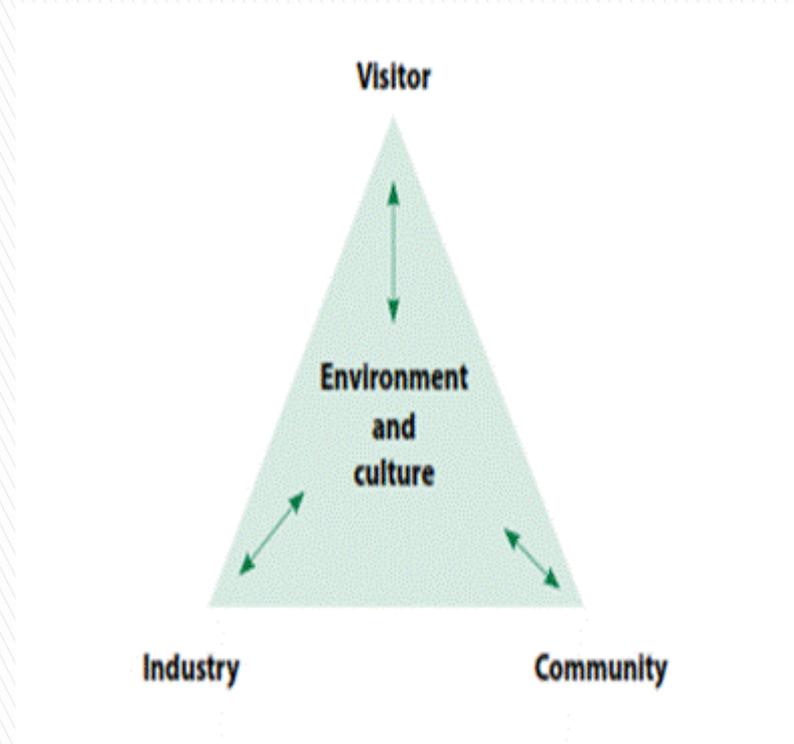
- ▶ Sustainable tourism development manages;
 - Impacts of tourism on destination environment,
 - Economy and community
 - Destinations resources for the present and future needs
 - ▶ Balance to protect and enhance resources while meeting the needs of all stakeholders !
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VICE model



VICE Model

- ▶ VICE model presents destination management as the interaction between:
 - Visitors,
 - Industry,
 - Community, and
 - Environment



VICE Model

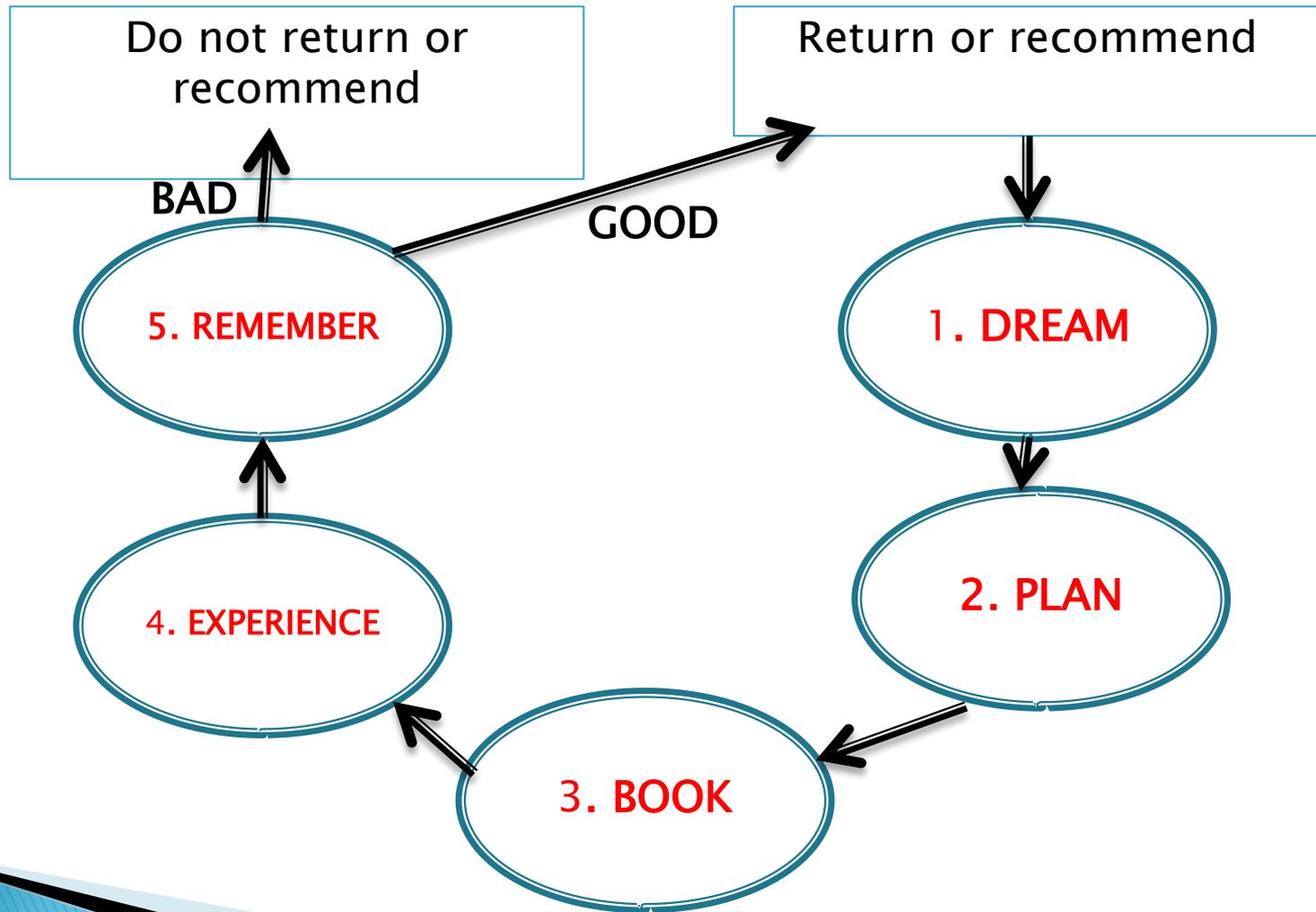
According to this model, it is the role of destination managers to work through *partnerships* and a joint *dest.mngt.plan* to:

- ▶ Welcome, involve and satisfy **Visitors**;
- ▶ Achieve a profitable and prosperous **Industry**
- ▶ Engage and benefit host **Communities**;
- ▶ Protect and enhance the local **Environment** and culture

- ▶ Model can be used as a check of the sustainability of a proposed plan or action.
- ▶ Four questions should be asked:
 - How will this decision affect the visitors?
 - What are the implications for the industry?
 - How does this affect the community?
 - What will be the impact on the destination's environment and culture?
- ▶ Positive answers to all four questions = right balance

- ▶ <http://sdt.unwto.org/content/10yfp-sustainable-tourism-programme>
- ▶ www.icrtourism.org

Customer Journey



BonjourQuébec.com: Following the customer journey

The BonjourQuébec.com website clearly identifies the different customer journey stages with the ultimate aim to encourage visitors to book their trip to Québec. These first three stages of the journey, and the services offered by BonjourQuébec.com website are outlined below. The tabs on the website appear as follows and clearly relate to these three initial stages.

1. Explore (Dream)

- Québec
- Travel experiences
- Tourist Regions
- To do and see
- Tailor-made holidays

2. Plan

- Accommodations
- Transportation
- Restaurants
- Useful tips
- Brochures

3. Book

- Rooms
- Best deals
- Packages
- Shows and entertainment
- Gifts certificates

See: www.bonjourquebec.com

www.bonjourquebec.com

Table 3 Customer journey, communications life cycle (CLC) and destination action

Customer journey	Communications Life Cycle	Destination action
Dream	Create awareness, emotional interest, specific ideas	Destination promotion
Plan	Provide 'hard' information	Visitor services
Book	Enable booking	Visitor services
Experience	Ensure quality of experience – facilities, services, 'public realm', information, booking	Management of the destination Visitor services
Remember	Maintain the relationship through research (behaviour, and follow-up action)	CRM

Destination Value Chain

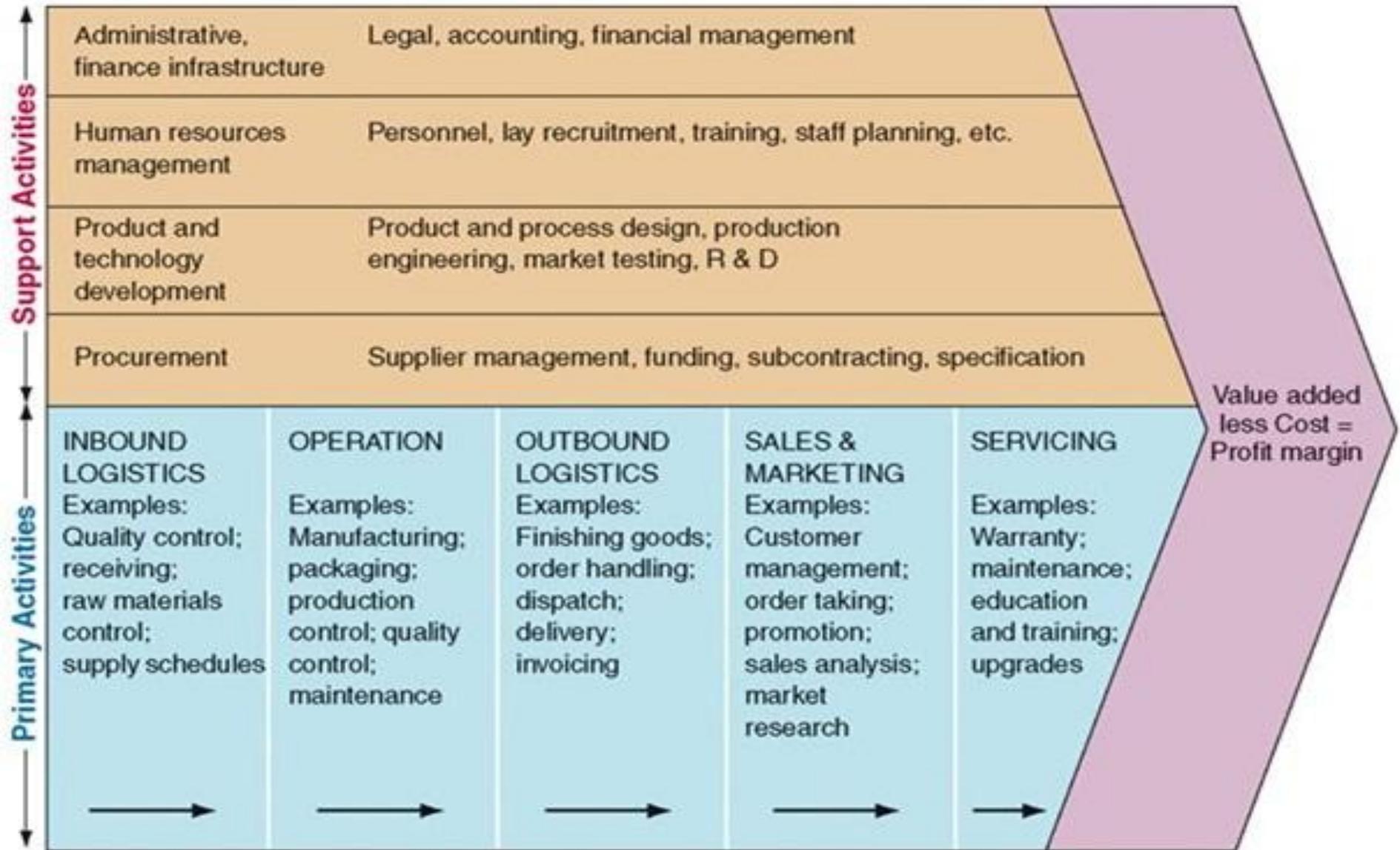
Figure 8 The destination value chain

PRIMARY ACTIVITIES	Product development	Destination and product packaging	Promotion	Distribution and sales	In and outbound logistics	Destination operations and services	Aftercare
	<ul style="list-style-type: none"> New airline alliances and destinations Development of environmental and cultural resources Upgrading and development of visitor services and facilities Exploiting new markets and market segments New routes, themes, hub/spokes and itineraries -Quality (standards) management and assurance systems Improved service delivery and visitor management 	<ul style="list-style-type: none"> Producing marketing materials Collectively packaging attractions of cities, areas and regions Negotiating commission and pricing contracts with suppliers Wholesale packaging 	<ul style="list-style-type: none"> Consumer advertising, PR and promotions Trade exhibitions, workshops, sales visit Marketplace representation Familiarisation trips Media liaison/ educationals 	<ul style="list-style-type: none"> Enquiry and info mail service Distributing destination information Brochure display Tour operators alliances Retail (travel agency) sales E-business Reservations Payment and ticketing Insurance Seat pricing and scheduling 	<ul style="list-style-type: none"> Visa and passport provision Airport facilities and services VAT reclaim Emigration services Check in and gate operation Baggage handling In-flight services 	<ul style="list-style-type: none"> Airport transfers Taxi services Public transport Visitor centres Accommodation Catering Tours Attractions Car rentals Entertainment Health and beauty Sport and recreation 	<ul style="list-style-type: none"> Database management Consumer and client tracking and feedback Industry feedback and follow-up

FOUNDATION ACTIVITIES	Destination planning and infrastructure	Public transport systems, roads, airports, rail, ports, public toilets, etc.	Bulk infrastructure telecoms, water, electricity, recreation, etc.	Destination planning, design, layout and land-usage	Energy, water and resource management	Aesthetic, environmental and social quality enhancement	Safety and security management	Road signage, information networks and other navigation	Public/private partnerships, strategic alliances, mergers and acquisitions	Institutional coordination and business deregulation
	Training and skills development	Community tourism awareness and acceptance	Skills training and education.	Personnel management – recruitment, motivation, incentives, etc.	Customer care, hospitality culture	Career pathing, staff development, staff stability	Labour relations and negotiations	Job creation and intensifying projects		
	Technology and systems development	Computerised reservation systems	Market research and intelligence	Management systems and procedures	Security systems	Information systems and communication				
	Related industries and procurement	Equipment and component supplies	Fuel, food and beverages	Contracted services	Professional services	Other services	Real estate/buildings			

VISITOR VALUE AND SATISFACTION

Value Chain Concept (Porter, 1985)



Destination Value Chain

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VISITOR VALUE AND SATISFACTION

9.2 Primary Activities

Primary activities directly involve the packaging, promotion and delivery of the tourism experience to the visitor. The public and private sector tourism industries consider these primary activities their core business and the missions and objectives of tourism product and service suppliers, intermediaries (agents/operators) and destination marketing organisations are largely tied to these primary activities including:

Product development. This is of key importance to ensuring constant rejuvenation of the destination offering. There are two different parts that make up the product. Firstly attractions such as natural, cultural and man-made products that provide the major reasons for travellers wanting to visit and experience the destinations and plant such as accommodation, catering and transportation which is mainly developed in support of the attractions of a destination and does not act as a primary motivator for travel. It is therefore of utmost importance that the attractions are constantly improved and expanded in accordance with new trends and developments in the marketplace.

Destination and product packaging. The intangible tourism product should be packaged as conveniently, attractively and accessibly as possible. Packages consist of a range of attractions, experiences, products and services and can be offered according to theme, suggested itineraries or geographical locations.

Promotion. The destination needs to be promoted to the marketplace either directly to the consumer or to the intermediaries (travel agents and tour operators) using a range of promotional methods.

Distribution and sales. Generic and commercial information should be distributed through the most appropriate channels. These include consumer enquiry lines, mailing services to distribute destination information, brochure display facilities, retail travel agency networks to quote, sell and make reservations, arranging insurances as well as payment and ticketing systems.

In and outbound logistics. Ease and speed of access, especially for long-haul destinations, is increasingly having an influence on destination choice. Choices to visit can be influenced by convenience factors such as availability and cost of flights, visa and passport provision, airport facilities and services, VAT reclaim facilities, emigration services, check in and gate operation, baggage handling, in-flight services, seat pricing and scheduling, etc.

Destination operations and services. The largest part of the tourist experience happens at the destination and this has a determining effect on the enjoyment levels and value experienced by the visitor. These include all aspects of the tourists visit including transfers, taxis and public transportation, visitor services and centres; accommodation, food/catering, tours, attractions, car and car rentals, entertainment, health and beauty services, sport and recreation, etc.

Aftercare. Client care and follow-up is essential to establish loyalty and positive attitudes among clients. Aftercare services include establishing, managing and maintaining databases of client information, client profiles and conducting industry feedback and follow-up programmes.

1.9.3 Foundation Activities

The foundation activities are those where the value delivery is indirect and supports the visitor experience e.g. infrastructure, planning, human resources development, technology and related industries such as construction, retail, etc. The provision of these foundation activities is especially challenging, since they are delivered by a range of public and private agencies that do not have tourism as their core businesses.

The efficient delivery of these activities and their performance are a fundamental foundation for building a tourism destination and as such are vital to the destination's success. The destination must live up to its brand promise, otherwise there will be high levels of dissatisfaction. Ensuring these foundation activities are in place requires strong leadership from the DMO.

Such delivery can only occur within the framework of *public/private partnerships and strategic alliances and effective institutional coordination* among the various players in the value chain.

These activities are summarised as follows:

Destination planning and infrastructure. The physical image, environment integrity and infrastructure of the destination are key determinants of the quality of the visitor's experience. The industry will not be able to function without transport infrastructure, such as an appropriate and operational transportation network (e.g. public transport, roads, airports) as well as *bulk infrastructure* such as telecommunications, water, electricity, recreation and access to communication channels. Operational public toilets must be provided for visitors and clean, safe drinking water is also essential. Where safe drinking water cannot be provided through the destination's infrastructure, drinkable bottled water should be available for visitors. The threat of diseases such as Aids, malaria, etc. put pressures on destinations to provide high quality basic infrastructures and services. The effective provision of *safety and security services* is of utmost importance to a successful tourism experience and is clearly one of the main 'levers' of tourism movement on the globe.

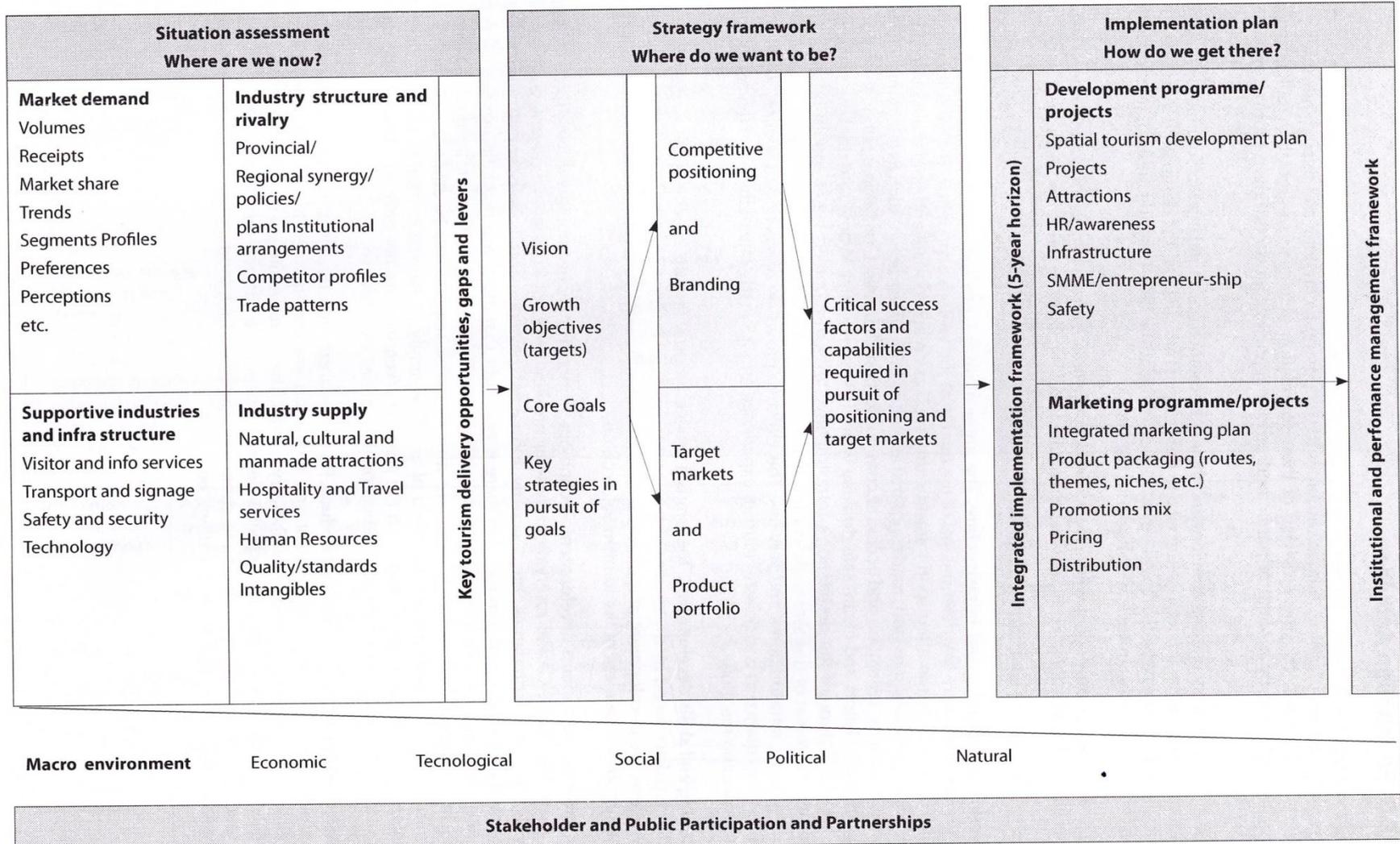
Training and skills development. Tourism is a service industry and the quality of the visitor experience is largely determined by the quality of service and personal interaction experienced at the destination. Therefore, the development of quality interactions with the people tourists encounter at the destination is an important element of the tourism value chain.

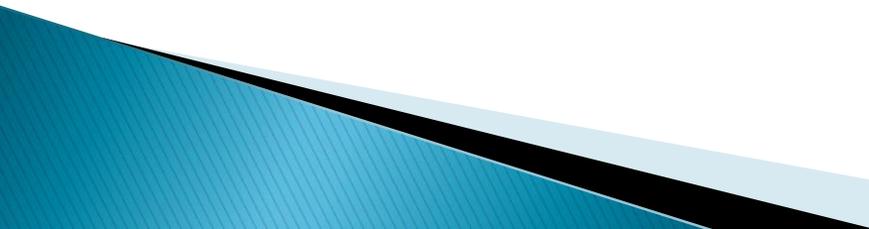
Technology and systems development. Technology is increasingly becoming a driving force in support of the value chain. Global reservations systems are key levers of competitive advantage for airlines, hotels, car rental companies, etc. Recently substantial developments have occurred with regard to Internet based reservation services and there is no doubt that these will revolutionise the concept of online reservations by providing access to a far greater number of destination product. Operational and management information systems are also of major importance. In *addition information and communication systems* are the lifeblood of an increasingly globalised consumer market. Electronic conferencing and constant contact with the global marketplace are not only important to the tourism industry, but may have a determining effect on the visitor's experience.

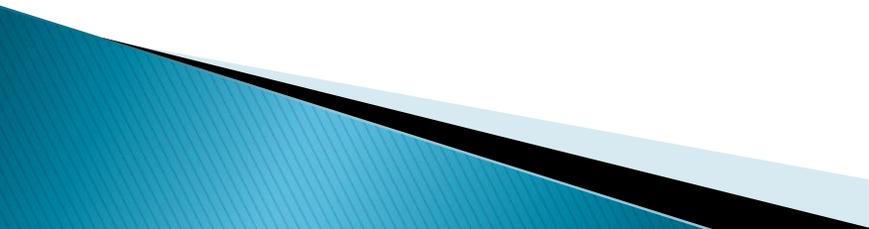
Related industries and buying local produce. Primary tourism industry activities such as accommodation, transportation, catering, entertainment and recreation are underpinned by a wide range of related enterprises that supply services to the industry sectors. These are an integral part of the tourism "cluster" and the success of the value chain is highly dependent upon the effective provision of these services and products. These include equipment and component supplies, fuel, food and drink, contracted services, professional services, real estate/buildings, etc.

Destination Strategy Development

Figure 9 A framework for destination strategy development



1. **Situation assessment (Where are we now?)** regarding the tourism competitiveness of the destination, including:
 - A macro-environmental appraisal, including political, economic, social and technological opportunities and threats that need to be taken into account when planning for tourism in the destination.
 - A market analysis and assessment, including the destination's tourism market share and performance, market trends and customer profiles.
 - An audit and assessment of tourism resources and services, including tourism attractions, services, routes and nodes.
 - An assessment of supportive infrastructure and services in the tourism value chain.
 - An analysis and assessment of the industry structure and rivalry including benchmarking and comparison with current and future competitors, synergies with other destinations, relationships with the travel trade channel and the nature and extent of local institutional collaboration.
 - Based on the above, a summarised assessment of key tourism challenges, delivery gaps, opportunities and levers for tourism growth.
- 

2. **A strategic framework (Where would we like to be?)** for future tourism growth based on the findings of the situation analysis, including:
- A tourism vision, growth objectives and targets, core goals in pursuit of the vision .
 - Key strategies to achieve these goals.
 - A distinctive positioning and branding strategy to differentiate the destination from competitor destinations.
 - A target market strategy to identify and profile the most appropriate and lucrative market segments, their profiles and preferences.
 - A suitable product portfolio to match the target markets .
 - An assessment of critical success factors and destination capabilities required in support of the positioning strategy and target markets.
- 

3. **An integrated, multi-year Implementation Plan (How do we get there?)** with specific programmes and projects, budget indicators and monitoring mechanisms to implement the strategic framework, including:
- A tourism development programme and implementation plan relating to e.g. spatial nodes and routes, critical infrastructure, tourism information systems, new product development and packaging, investment promotion, human resource development and awareness, SMME development, support infrastructure and services, safety and security, etc.
 - A tourism marketing programme and implementation plan that supports the brand and focuses on attracting target markets through an integrated marketing mix, i.e. product packaging, distribution channels (travel trade, Internet, visitor network, etc.) and promotional activities (PR and media, advertising, promotions, etc.).

4. Institutional and performance management arrangements (How do we organise ourselves to get there and measure success?) including:

- A suitable organisational system for the future management and execution of tourism in the destination, that:
 - Is based on the findings the strategy and implementation plan;
 - Complements other initiatives and structures e.g. national and regional/provincial tourism institutional policies and frameworks;
 - Is based on the public/private partnerships.
- Monitoring and evaluation mechanisms to measure and evaluate strategic performance.
- Cooperative mechanisms with other complimentary sectors and industries such as arts, heritage, events, business promotion, etc.

During this stage the impact of the strategy would have to be evaluated. This would be likely to cover a number of differing factors (e.g. growing the economic benefits, spreading seasonality or levelling demand, securing investment, raising quality, etc.) depending on the priorities of the strategy. Different research methods will be required to assess different types of impact but they can be broadly divided into two categories:

- Assessment of macro impacts through destination wide research such as national surveys, occupancy surveys etc.
- Assessments of the impacts of individual programme – e.g. campaign evaluations.

PROJECT:

- ▶ Apply Destination Strategy Development Model to a destination
- ▶ Delivery time: As scheduled...

Good Luck !!



Strategic Foundation: Assessing the Situation and Setting a Vision, Goals and Objectives

Market and competitive research and analysis



SWOT analysis:
Strengths
Weaknesses
Opportunities
Threats



Development of Destination Vision, goals and actions

Elements of Situation Analysis

- ▶ Macro Environment
 - ▶ Destination Resources
 - ▶ Destination Markets
 - ▶ Supporting Industries
 - ▶ Industry Structure
- 

Table 4 Examples of macro-environment changes

Economic	Socio-demographic	Political	Technological	Ecological
Exchange rates	Demographic trends	Global/regional conflicts	Global distribution systems	Environmental strain on popular destinations
Interest rates	Health threats	Regional relations	Internet and CD Rom marketing	Market concern for responsible travel (triple bottom line)
Economic stability	Lifestyle and value trends	Changes in power structures	Transport innovations	Species awareness
Inflation	New tastes and social trends	Occurrence of extreme events	Virtual reality	Increased focus on values, sustainability and ethics
Fuel prices	Leisure orientation	Legal restrictions	Video and teleconferencing	
Aviation costs	Sport, health and fitness	Positive political developments		
Privatisation	Global village			
Currency re-evaluations	Impact of the media			

SWOT analysis for “Anywhere” destination

The destination is in a beautiful natural setting which contains a wide range of outdoor activity options, including walking, climbing, water sports activity, golfing and even winter skiing. It is characterised by at least one iconic feature, with others in the wider area that itself part of an iconic brand. This is understood and appreciated by a number of business tourism leaders who keen to see a new impetus being established that will reverse the destination’s poor performance in recent years. The destination is relatively inaccessible. It has a main line rail link and trunk road connections to southern metropolitan area but lack of a nearby airport restricts its ability to attract budget airline short-break vacationers. The tourism infrastructure is not as good as it should be as a result of poor planning decisions and a lack of investment which is linked to seasonality, despite the evidence of some winter business. The area also has a reputation for poor weather which is exacerbated by a lack of good indoor attractions. Poor market intelligence is another problem, although in this the destination is not alone. It is relatively worse than others in the size and scale of the tourism base and the income that is available for new investment in the product and the destination’s marketing.

Marketing is increasingly about finding niche market opportunities. There are plenty in this destination but they are mainly associated with its outdoor strengths, which suggest that its market positioning should capitalise on this. Related to this, with investment there is a chance to develop the destination as a “well being” centre which could be regarded as an emerging market. This also could in turn help to attract secondary vacations, which the destination needs because of its relative remoteness, from a range of significant metropolitan areas. Events could also play a supportive role, although the destination’s location means that these will be unlikely to attract significant numbers of general visitors into the area.

Partnership marketing –both within and beyond the destination- is not only a chance, it is a necessity. There is a relatively low base of tourism revenue in the destination (the “push” factor) but there is in any case merit in joining with others within the wider region, given its brand strength (the “pull” factor). When push and pull co-exist, the opportunities they provide should be capitalised on. The destination’s declining market share is warning, especially if the base is allowed to fall below recovery levels. This could happen if the weaknesses associated with the built infrastructure, especially related to the accommodation stock but also in respect of indoor things to do in wet weather, are not addressed. The problems associated with poor market intelligence will also have to be addressed and the wider tourism community engaged in the recovery process in a way that is meaningful in terms of them taking ownership of it, albeit under the leadership of the key, active players in the locality.

Strenghts

Weaknesses

Opportunities

Threats

Strengths

- * Excellent outdoor all-year product
- * Iconic feature
- * Part of wider strong brand
- * Active business leaders
- * Excellent natural assets

Weaknesses

- * Relatively inaccessible
- * Unsatisfactory built infrastructure
- * Reputation for poor weather
- * Poor market intelligence
- * Relatively small operator tourism base



Opportunities

- * Outdoor activities market
- * Well-being niche market opportunity
- * Secondary vacations
- * Event tourism
- * Partnership marketing

Threats

- * Declining market share
- * Local unconcern
- * Inability to change
- * Wrong decision-making
- * Lack of investment



Identifying Competitors

Compared to us 1 = Extremely different 5 = Extremely similar	Potential Competitor Destinations					
	A	B	C	D	E	F
1. Top 10 source market	5	3	2	4	2	4
2. Distance from our key source markets	2	4	4	2	2	5
3. Products and experiences promoted	2	4	2	3	2	4
4. Market segments targeted	2	3	2	4	3	4
5. Average annual growth past 5 years	5	4	4	3	3	2
6. Peak tourism months	1	4	5	2	2	5
Average	2.8	3.7	3.2	3.0	2.3	4.0

Watching the Competitive Environment

Supplier and Buyer Power

The influence of major hotel groups, airlines and tour operators – their price and cost structure, quality, diversity

Threat of Entry

Be aware of new up and coming destination and their comparative cost and quality. Ensure destination remains ahead of newcomers. Consider options for differentiation.

Complementors

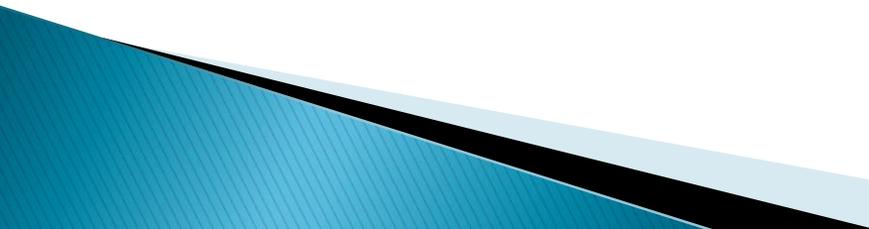
Regional and local joint marketing agreements with other destinations, economic sector (e.g. Film industry) and suppliers can expand the length and depth of your product.

DESTINATION

Current Competitors

Who are they? Their resources and performance compared with yours. Be aware of their positioning and branding strategies

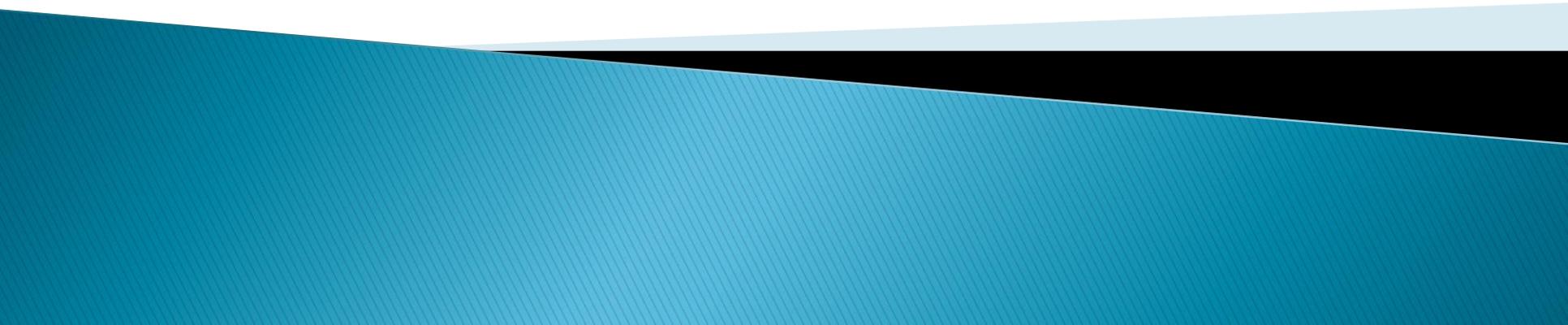
Setting a Vision, Goals, Objectives and Core Strategies

- ▶ Destination vision should be a shared dream of a future destination, based on desired position.
 - ▶ The vision should be:
 - Inspiring, imaginative and speak to aspirations of stakeholders;
 - Achievable and consistent;
 - Formulated with broad participation, using participatory methods
- 

- ▶ The goal should:
 - Break the vision into defined outcomes;
 - Be medium /long term focused;
 - Address key levers identified in competitive and macro analysis;
 - Be a realistic and consistent guide to action;
 - Build upon the destination's strengths and take the best of the available growth opportunities;
 - Eliminate the weaknesses whilst also guarding against the threats in the external environment;
- 

- Adhere to SMART principle:
 - Specific. Objectives should specify what exactly you want to achieve;
 - Measurable. You should be able to measure if you met your objectives;
 - Achievable. Are the objectives you set achievable?
 - Realistic. Can you realistically achieve them with the resources you have?
 - Timebound. In what time-scale do you want to achieve the objectives?
- 

Positioning and Branding the Destination



Competitive Positioning of Destination

▶ Introduction

There are three broad approaches companies or destinations can follow to establish an advantage over competitors, namely:

Cost leadership. Consistently controlling and reducing costs and improving efficiency of operations, thereby out-pricing competitors

Focus. Becoming specialists in a very focused area of activity

Differentiation. Offering clients a product, service or experience that has a unique value and is different to those alternatives offered by competitors.

Basis of competition	Key strategy elements	Resource and organisational requirements
Cost Leadership	Investment in scale-efficient plant; design of products for ease of operation; control of overheads; R&D; avoidance of marginal customer accounts	Access to capital; process engineering skills; frequent reports; tight cost control; structured organisation and responsibilities; incentives relating to quantitative targets
Differentiation	Emphasis on branding and brand advertising, design, service and quality	Marketing abilities; product engineering skills; creativity; capability in basic research; subjective rather than quantitative measurement and incentives; strong inter-functional coordination
Focus	Specialisation in a particular product or service; focused and niche and highly segmented marketing; consistent product innovation and cutting edge technology	Customer relationship management; market leadership through product specialization and expertise; consistent innovation and product engineering; copyright, concessions and patent ownership

While consumer choices of transport modes and booking channels are increasingly affected by cost, their choices of destinations and experiences are increasingly affected by differentiated product. Consumers will consider how destinations are tailored to their needs and how unique these are in relation to other destinations and experiences.

One of the most effective ways of differentiating products is based on product attributes, i.e. characteristics that are “owned” by the product. To demonstrate this point, let’s consider how the various car manufacturers differentiate their products:



Driving



safety



Engineering

Mercedes-Benz



Reliability



Styling

While most motorcar manufacturers use attributes to differentiate their product, concepts can also be used to differentiate products:



Market leadership



Market heritage



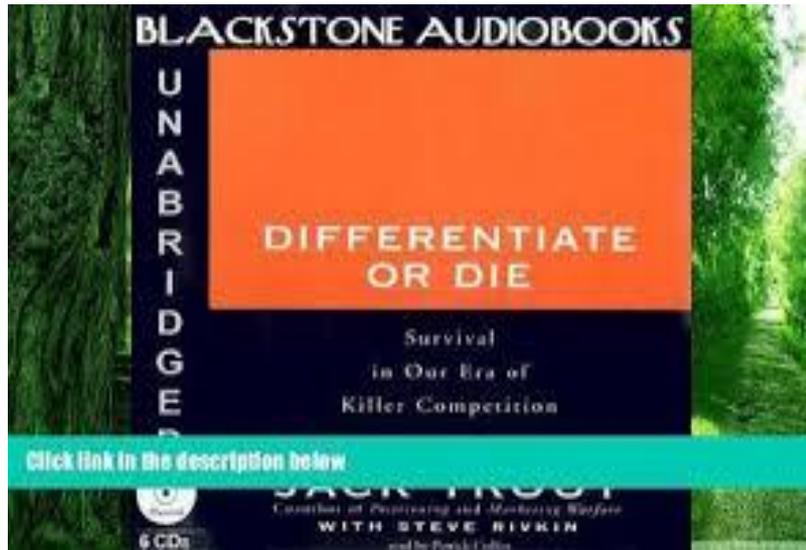
Being the latest



Offering a full range of products



How the product is made



“Competition is not a battle of products or services, it is a battle of perceptions in the customer’s mind”

Jack Trout

Unique Selling Propositions and Unique Emotional Propositions

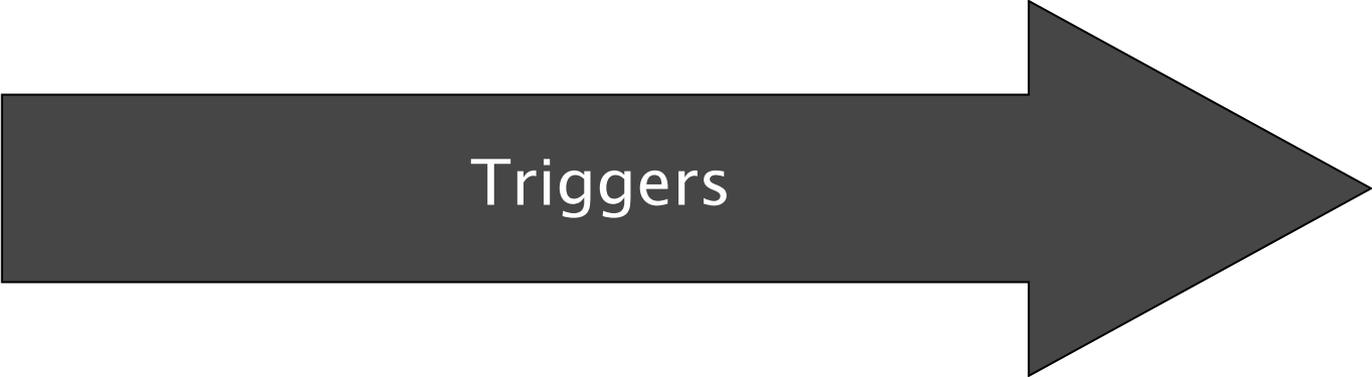
The key to differentiating the destination is finding a Unique Selling Proposition (USP) and promoting this so as to “own” a unique and valuable tourism attribute(s) in the minds of your current and potential customers.

In the new era of tourism, with a proliferation of new destinations entering the market, it has become increasingly difficult for destinations to base their positioning on physical attributes and factors such as climate (the subtropical paradise), geography (e.g. the river city), services/Infrastructure (“bandwidth Bay” – San Diego), or icons (e.g. landmark buildings, topographical features, etc.).

Customer decisions are increasingly influenced by;



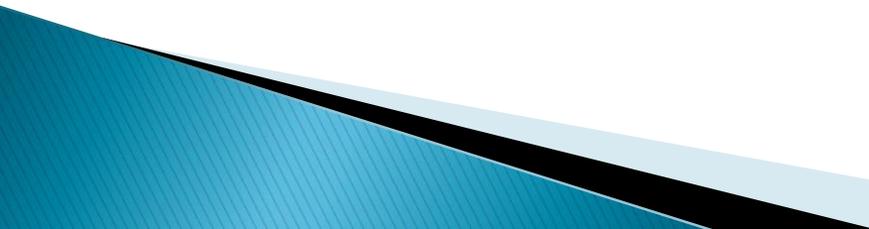
Emotional reactions



Triggers

- ▶ If potential tourists have empathy with your destination and its values
 - ▶ You win !
 - ▶ USP ?
 - ▶ Unique Selling Proposition
becoming
 - ▶ UEP ?
 - ▶ Unique Emotional Proposition
- 

In destinations, UEP is:

- ▶ A single proposition as emotional trigger
 - ▶ Not offered by, or unable to be offered by, competition
 - ▶ Something which the destination has the credentials to deliver on and to exceed client expectations
 - ▶ Strong enough to convert “lookers” to “bookers”
 - ▶ The cornerstone of your competitive strategy and communication
- 

CANADA

UNIQUE SELLING PROPOSITION

The ultimate in personal
exploration

“Keep Exploring”

<https://www.youtube.com/watch?v=HfTkZmKK1b0>

EMOTIONAL PROMISE

Personal immersion and
escapism

INDIA

UNIQUE SELLING PROPOSITION

Incredible spritual discovery and diversity

“Incredible India”

<https://www.youtube.com/watch?v=uIE2CbvCCG0>

EMOTIONAL PROMISE

Adventure, spritualism and mystique

MALAYSIA

UNIQUE SELLING PROPOSITION
The best of Asian culture
“Malaysia Truly Asia”

<https://www.youtube.com/watch?v=uZ3tB1UO1hM>

EMOTIONAL PROMISE

Broadening cultural horizons

NEW ZEALAND

UNIQUE SELLING PROPOSITION

Most unspoilt/authentic nature/lifestyle
“100% Pure New Zealand”

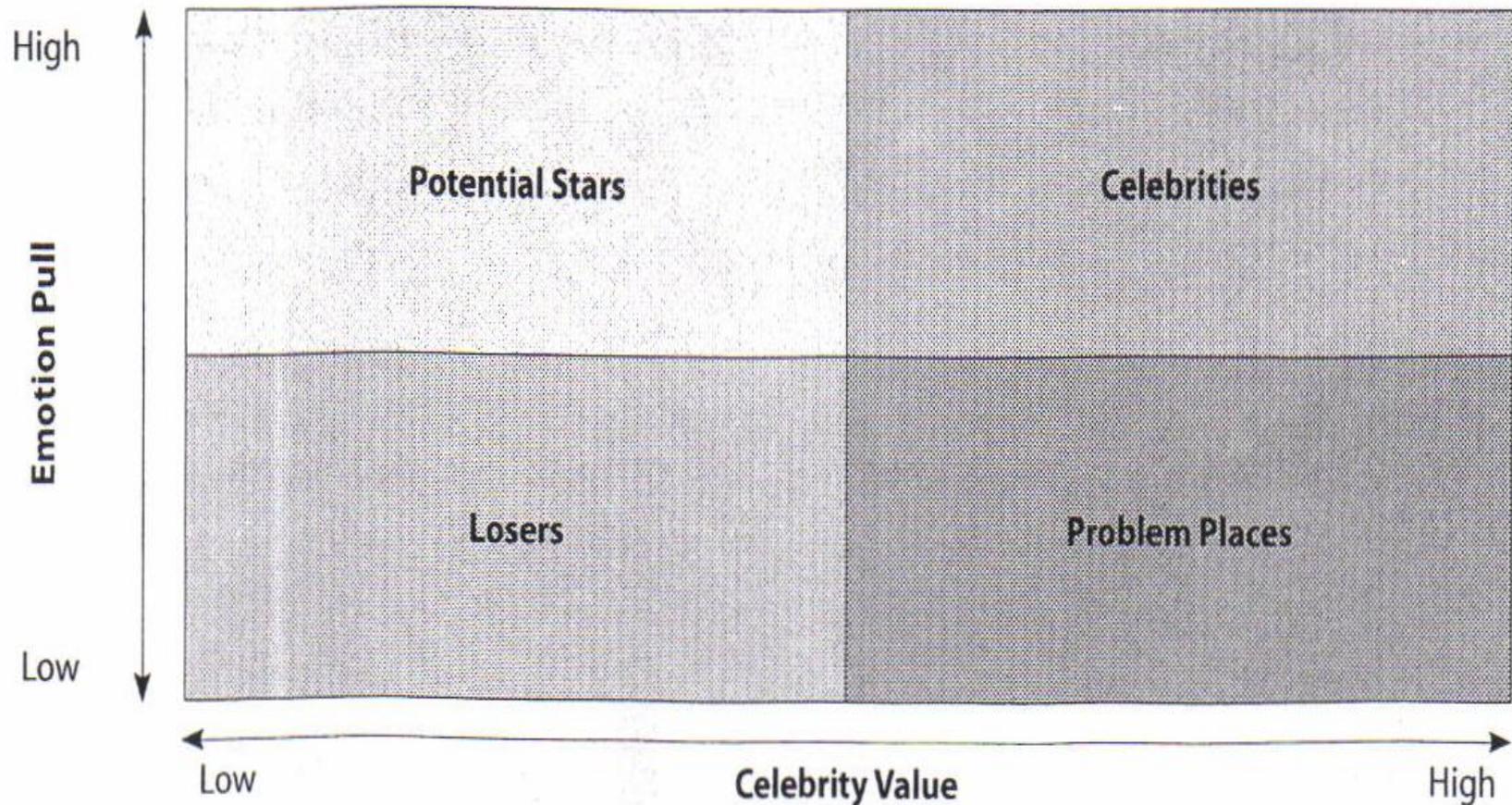
https://www.youtube.com/watch?v=kWOWe_n-2Gw

EMOTIONAL PROMISE

Back to nature the way it was

On any positioning map brand winners are those places which are rich in emotional meaning, have great conversation value and hold high anticipation for potential tourists. The message is that rich, strong destination brands sing a song of difference and have a sense of being somewhere worth visiting ³.

Figure 13 Brand winners and losers



Positioning Rwanda ⁴

Around 2001 Rwanda's tourism authorities realised that tourism was a potentially powerful growth sector but they had a major image problem due to the regional history of conflict and genocide.

To move forward, Rwanda adopted the competitive advantage model, seeking to differentiate itself for customers willing to pay a higher price. Rwanda's tourism strategy creates revenue by emphasising unique value and high prices for each visitor. Rwanda differentiates itself and has created a special selling proposition through focused market segments, in particular eco-travellers (looking to experience primates, ornithology and other niches such as butterflies and flowers) and explorers (looking for cultural and educational experiences such as dancing and drumming and socio-political interests such as conflict resolution and Gacaca).

See: www.rwandatourism.com and <http://rwanda.usaid.gov/images/Docs/biodiversity/Rwanda%20tourism%20policy.doc>

Table 8 Examples of destination selling propositions

Examples of destination management decisions	Positioning: Eco authenticity
The scale and type of developments sought, allowed and promoted	Low density, environmentally sustainable designs, use of local material
Quality and service levels	Personalised attention with local participation and cultural interaction
Local content/participation	Strong focus on local content, participation, materials, etc.
Carrying capacity	Low volume, sensitive
Brand design e.g. <ul style="list-style-type: none"> • Forms and shapes • Colours and textures • Tone of voice • Photographic angles 	Natural shapes and colours Soothing tone of voice with local themes Natural and local image design and forms

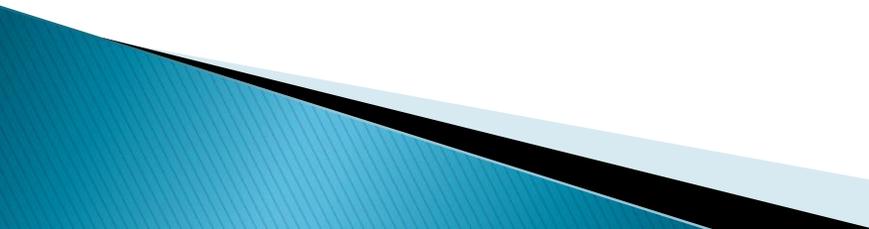
Strategic role of destination brand

Competition for tourists in a highly competitive destination marketplace is increasingly being fought over minds and emotions rather than physical features and price. The destination brand communicates and signals the competitive positioning. Since DMOs are mandated to manage the destination's image, effective branding could be an extremely valuable and powerful tool in their hands.

A brand could be defined as a unique combination of product characteristics and added values, both tangible and non-tangible. The characteristics have a relevance that is inextricably linked to the destination and awareness of this may be conscious or intuitive.

The brand is not only a trademark (logo, strapline or icon), but an experience and image that signals a value system and positioning. In short, it is a PROMISE. It establishes the kind of experience that the visitor can expect from the destination.

Benefits of Effective Destination Branding

- ▶ Destination awareness and demand creation
 - ▶ Customer loyalty
 - ▶ Customer value
 - ▶ A base from which to co-ordinate private sector efforts
 - ▶ A basis for establishing “seamlessness” between communication tools
 - ▶ Image enhancement wider than tourism
- 

Key Factors for Success

- ▶ Brand credibility
 - ▶ Deliverable
 - ▶ Differentiating
 - ▶ Conveying powerful ideas
 - ▶ Enthusing for trade partners
 - ▶ Resonating for the consumer
- 

“I Love New York”: Reviving New York’s tourism industry post 9/11 ⁶

The “I love New York” brand has been one of the strongest, longest-lasting regional brands in North America if not the world, running for some 30 years. The design is one of the most recognisable logos of any city in the world. The powerful emotions evoked by the brand took on new meaning in the aftermath of the World Trade Center tragedy, allowing New Yorkers to honour their heroes, survivors and victims and to demonstrate their pride in their city and for the world to express their compassion and solidarity. Recognising the strength of the campaign, its logo and slogan, Governor Pataki announced an unprecedented US\$ 40 million “I love New York” advertising campaign three weeks after the attacks to both solicit and convey support for New York. In the weeks and months which followed, the “I Love New York” campaign proved invaluable in the efforts to rebuild downtown’s economy, retain vital businesses and industries and revive New York’s tourism industry.

This example illustrates the powerful influence that a strong brand such as this can evoke, assisting the city to recover from extreme events such as the 9/11 tragedy.



See: www.iloveny.com

Understanding Your Targeted Market

- ▶ Focus on key target markets
 - ▶ Market research on needs and wants
 - Tangible : accommodation, attractions etc.
 - Intangible: fun, relaxation, adventure etc.
 - ▶ People are motivated by emotion more than reason
 - ▶ Find out why visitors want by understanding emotional factors
- 

Brand Building Process

Figure 14 The branding process

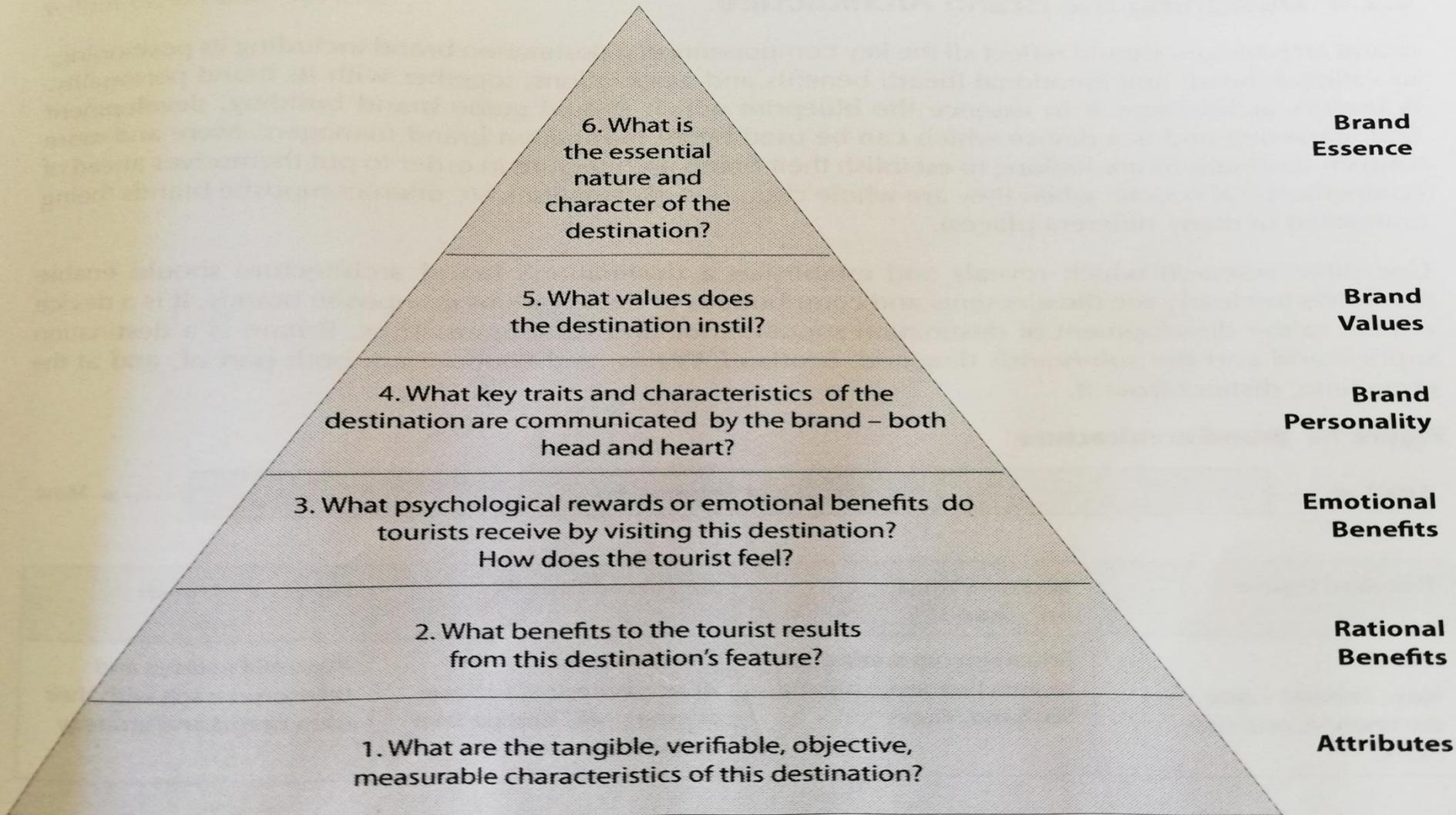


■ Key expertise = strategic

■ Key expertise = design and advertising

Developing the Brand Identity

Figure 15 The brand pyramid



The Zanzibar Brand Pyramid

Brand Essence:
Vibrant=the place;
Escape=the visitor benefit; **Engaging**=the relationship with visitors; **Mystique**=the intangible feel.

Positioning Statement: A legendary name but a real place, where white beaches and turquoise seas frame Islands rich in a vibrant, welcoming culture and living history.

Brand Personality: Beautiful, romantic and exotic tropical islands, full of mystique. They are alive, vibrant, steeped in history and tradition, with friendly, welcoming people.

Emotional Benefits: Amazed by the diversity of the Island: the beautiful coast, the exotic food, and the rich culture. Enriched by the history and culture of the Islands. Privileged to be amongst people who live peacefully together and are welcoming and friendly. A surprising sense of belonging to the Islands. A feeling of being at ease.

Rational Attributes: Relaxing on extensive white sandy beaches. Swimming in warm and safe turquoise sea. Choose from a variety of accommodation for different budgets and tastes. Visit Stone Town with its unique history, architecture and living Swahili culture. Enjoy the fresh island food from the sea and land.

Incredible India ⁷

In 2002/2003, the Indian government launched the Incredible India branding campaign aimed at acquainting domestic and international travellers with the many unique experiences that India offers.

The objectives of branding India were to:

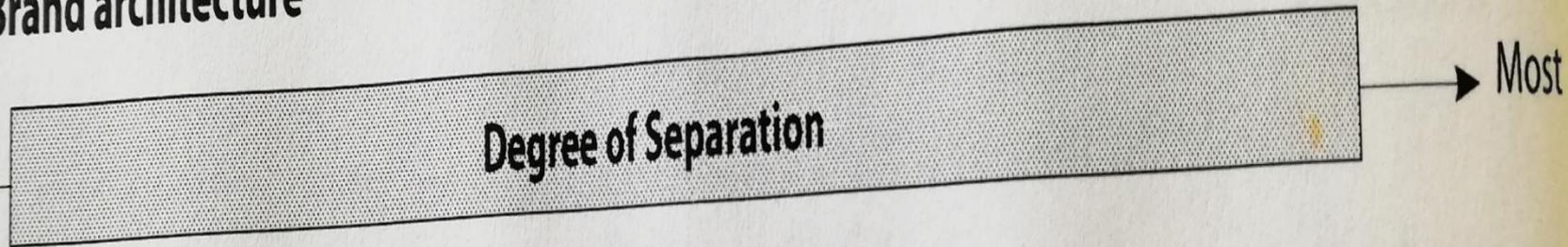
- Produce a unique and attractive offering to meet the rational and emotional needs of the tourists and build a strong visual identity for India.
- Develop India into a global brand, with worldwide recognition and strong brand equity and create a unique identity for India as a differentiated tourism destination.
- Re-position India as a premium destination with all communication sharply focussed to attract upmarket clientele.

In support of this upmarket brand, their focus has been to improve infrastructure and provide, clean, hygienic surroundings at heritage sites and monuments. The Ministry of Tourism has also moved towards developing integrated circuits creating one tourism and cultural hub in each state of India and islands of excellence from tourist arrival to departure.

See: www.incredibleindia.org

Designing Brand Architecture

Figure 16 Brand architecture



Branded House	Master Brand Sub Brands	Endorsed Brands	House of Brands
Nepal New Zealand – one destination, one core brand	Britain incorporating sub-brands London, England, Scotland, Wales	Florida brand endorsement of various theme parks and partner attractions	Australia's states and territories each with their own brand and strategy

Marketing the Destination



Current Market Trends

Globally, tourism is being influenced by a number of trends. These are sometimes quite contrary and work in different ways on different groups.

DMOs should be aware of these trends and guide the development of their tourism product to take account of trends which may directly or indirectly affect consumer choices and behaviour.

The following are some important emerging trends that could affect market performance.

Demographics

- In mature tourism markets, such as Europe and North America, populations are ageing but are remaining active into older age. Opportunities lie in health tourism products.
- At the other end of the age spectrum, the youth market has more money to spend and is becoming a more significant segment. This is particularly the case in emergent generating countries (like China). Growth in the youth markets creates opportunities for active/adventure tourism.
- Leisure time globally is increasing, but for the wealthy it is becoming more pressured. Concepts of time-rich, time-poor, and money-rich will be more important in segmentation and the way in which markets purchase products.
- Trips are becoming shorter. However a contrary trend is the emergence of “saving time” i.e. taking a sabbatical or trip of a lifetime.
- The general trend is towards more independent travel and away from traditional package tours. However, time poor markets are more likely to be seeking “bundled products” purchased in one transaction.

Current Market Trends

Environmental issues

- Climate change, and increasing environmental and social responsibility are key trends.
- Consequences of these on tourism could include:
 - Increased costs of maintaining natural resorts.
 - Changes in tourism flows and seasonality.
 - Rises in demand for “eco-tourism” and nature based vacations.
 - Increased environmental related legislation and costs.

Macro-economic factors

- Globalisation will continue and more global trade in goods and services with a greater homogeneity of cultures.
- This will help to create both new destinations and new markets. However the global market place will be more competitive.
- It will also lead to a more global workforce with increasing proportions of jobs filled by foreign labour.

Safety and security

- While there are growing feelings of insecurity, fuelled by terrorists targeting tourism destinations, consumer attention spans are becoming increasingly short with a resignation to the inevitability of such disasters.

Consumer and lifestyle trends

- People are becoming increasingly motivated by internal determinants, such as the desire for self-development and creative expression. People are also increasingly seeking genuine experiences rather than staged ones. These trends will result in: Experienced travellers demanding higher quality experiences and services at all levels of expenditure.

Current Market Trends

- Fewer repeat visitors and a greater difficulty for destinations to build loyalty.
- A search for different experiences and the growing demand for 'safe danger' (e.g. adventure travel or the development of destinations which offer a 'controlled edge').
- There will also be increasing demand for spiritual products based on inner experiences. Health products will be increasingly added to other tourism products.

Trends in marketing

- Consumers are seeking advice from other consumers through the Internet (e.g. blogs). Neotribes or new-common interest groups and communities and social networking sites are a main resource for orientation and knowledge. TripAdvisor, RealTravel and IgoUgo are good examples. This trend potentially has major implications for DMO activities.
- The Internet will drive future developments in travel/tourism product distribution.
- Changes in Information Communication Technology (ICT) will include advances in areas of mobile phones and digital TV, richer product data for the consumer, and development of new electronic payment systems.
- Marketing messages based on experiences and feelings will have greater importance in travel decisions. Tailor made and personalised products will become more important.
- Unique selling propositions (USPs) will become more important but will need to be expanded into unique experiential selling propositions (UESPs).

Transport

- Cars will remain as the primary mode of transport for visitors, particularly for domestic travel.
- New destinations are being created through improved accessibility, such as the development of new airports, and budget airline routes.
- Destinations not easily accessible by direct or inter-modal transport systems will suffer.

Market Segmentation

- ▶ There are several reasons to segment a market:
 - Only a small percentage of the world's population takes an international trip in any one year
 - Demand for tourism goods and services is not randomly or equally distributed throughout a population
 - To develop the products according to the customer's needs, wants and desire
 - Segmentation helps inform which marketing channels and media are the right ones

The key to effective target marketing is to:

- ▶ Identify groups of people (segments) who are, or will be, in the market for an international trip
 - ▶ Decide whether these are the people who, if they visited, would help fulfil the destination's tourism objectives
 - ▶ Establish the destination has the appropriate products and services to meet their needs
- 

- ▶ Assess whether people in these segments are realistically likely to consider the destination
 - ▶ Establish their motivation/triggers, buying habits etc.
 - ▶ Persuade them to visit using appropriate and targeted marketing messages and channels
 - ▶ Evaluate and review the impact of the marketing on the segments that have been targeted
- 

- ▶ No ideal number of segments.
 - ▶ Choice depends on the reason for segmenting
 - Demographics /lifestage
 - Geo-demograpichs (i.e. Based on common characteristics of people living in the same area)
 - Transport preferences
 - Loyalty/purchase behavior
 - Needs/activities
 - Values/beliefs/attitudes
- 

Museum Visits in 2017

1	Konya Mevlana Müzesi	2.480.433
2	İstanbul Topkapı Sarayı Müzesi	1.932.726
3	İstanbul Ayasofya Müzesi	1.892.250
4	Nevşehir Hacıbektaş Müzesi	498.880
5	Ankara Cumhuriyet Müzesi	360.879
6	İstanbul Topkapı Sarayı - Harem Dairesi	353.285
7	İstanbul Arkeoloji Müzeleri	299.616
8	Antalya Aziz (St.) Nikolaos Müzesi	287.581
9	Ankara Anadolu Medeniyetleri Müzesi	189.246
10	Gaziantep Zeugma Mozaik Müzesi	167.958

- ▶ Barcelona FC Stadium ?
- ▶ 2 million visitors !