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DESTINATION MARKETING ORGANIZATIONS AND DESTINATION MARKETING: A NARRATIVE ANALYSIS OF THE LITERATURE

Steven Pike and Stephen Page

ABSTRACT

This article presents the first narrative analysis of the areas of research that have developed within the destination marketing field since its commencement in 1973. Given the broad extent of the field, and the absence of any previous reviews in four decades, a key challenge is in providing a focus for such a disparate body of knowledge. The review is structured around one principal question: ‘To what extent is the Destination Marketing Organisation (DMO) responsible for the competitiveness of the destination’? In pursuit of this underlying question, we address a number of themes including nomenclature and the DMO, the evolution of the destination marketing literature, competitiveness as the DMO *raison d’être*, and DMO effectiveness including issues of branding and positioning, and future research themes in the field.

KEYWORDS

Destination marketing organisations, destination marketing organizations, destination competitiveness, destination branding, destination image

1. INTRODUCTION

Destination marketing is now acknowledged as a pillar of the future growth and sustainability of tourism destinations in an increasingly globalised and competitive market for tourists (UNWTO, 2011). Published research related to destination marketing represents an important growth area in tourism that has evolved to a distinct paradigm (Bowen, Fidgeon & Page in press), and its significance is reinforced by four key propositions that are associated with global tourism: first, most aspects of tourism take place at destinations (Leiper, 1979);

second, the United Nations World Tourism Organisation (UNWTO) proposed that destinations were “the fundamental unit of analysis in tourism” (WTO, 2002); third, destinations have emerged as the biggest brands in the travel industry (Morgan, Pritchard & Pride, 2002), and lastly, a large number of nations, states and cities are now funding a Destination Marketing Organisation (DMO) as the main vehicle to compete and attract visitors to their distinctive place or visitor space. Therefore, not only has the destination and destination marketing emerged as a central element of tourism research (Wang & Pizam 2011, Fyall, Garrod & Wang 2012), it is associated with the operational activities undertaken in the highly competitive business of attracting visitors to localities. While this in itself is not a new activity (see Ward 1995 for a historical analysis), what is new is the scale and extent of this highly competitive activity as acknowledged by Ashworth and Page (2011) in relation to urban tourism, which equally applies to all types of destinations.

1.1 Aims of this analysis

A review of the first 40 years of destination marketing research is challenging for at least two reasons. First, this is a broad field with a diversity of research topics, spread across up to 150 English language tourism-related journals (see Goeldner, 2011) including the *Journal of Destination Marketing and Management* established in 2012, and an unknown number of non-tourism journals, which examine the DMO from a supply perspective, considering themes as varied as destination information systems, the politics of DMO governance, destination lifecycles, stakeholder collaboration, brand identity development, funding, and marketing communications; while the demand (consumer-traveller) perspective includes issues such as consumer perceptions, decision making, and loyalty. Second, while some *Progress in Tourism Management* articles have been underpinned by previous papers that commented on discrete elements of destination marketing (see for example Buhalis & Law 2008, Weed 2009, Ashworth & Page 2011) and reviews of contemporary themes such as the growth of medical tourism destinations (see for example Connell, 2013), no prior review of the destination marketing field was identified in a search of the literature. Indeed, Noel Scott posted a list of 182 published tourism related literature reviews on TRINet (5/9/12)¹,

¹ TRINET is an online discussion group comprising over 2000 tourism academics with postings made by individual and replies and discussion freely occurring.

following input from listserv members, which did not contain any references to an analysis of the destination marketing literature.

Therefore, given the field is now well established after four decades of academic work with many Faculties now offering modules in Destination Marketing, a ‘situation analysis’ might be helpful to map out and provide a critical discussion of the field (Fyall, Garrod & Wang, 2012). However, following Weed (2009), this analysis does not attempt an ‘epiphanic’ approach, which would lay claim to identifying a single truth of past, present and future research due to the arrival of the field’s ‘maturity’ or ‘turning point’ that just happens to occur at the time of writing the review. Instead, the aims of the review are two-fold: first, we seek to identify and provide an overview of the subject’s emergence and a coherent roadmap of the key research themes that have emerged since the first studies were published in the early 1970s, and secondly, to provide a summary of possible future research agendas structured around the principal theme of the review – the role of the DMO in leading destination marketing.

1.2 Structure of this analysis

To provide a focus for the review, the paper is structured in the following way: i) the analysis commences with a discussion of the key challenge of delimiting the field, including nomenclature and the DMO; ii) the evolution of the destination marketing literature is then summarised; iii) a destination marketing framework is proposed with sustained competitiveness presented as the DMO *raison d’être*; iv) DMO effectiveness in the pursuit of destination competitiveness is discussed under the themes of destination brand identity development, destination positioning and marketing performance measurement tracking; v) the paper concludes with a summary of possible future research themes in the field.

2. UNDERSTANDING DESTINATION MARKETING RESEARCH: DELIMITING THE FIELD

A destination represents an amalgam of a diverse and eclectic range of businesses and people, who might have a vested interest in the prosperity of their destination community; although

research on small and micro businesses has indicated that not all stakeholders are necessarily interested in the viability of the destination, when their principal objective for operating a business is lifestyle (Thomas, Shaw & Page, 2011). Nevertheless, the success of individual tourism ventures and cooperatives will depend to some extent on the competitiveness of their destination (Pike, 2004) and the leadership of the amalgam of stakeholders associated with the tourism industries (Leiper, 2008). Emerging research empirically testing this proposition includes SMEs' dependence on DMO resources in Finland (Seppala-Esser, Airey & Szivas, 2009) and hotel performance in Spain (Molina-Azorin, Periera-Moliner & Claver-Cortes, 2010). Therefore, if the main focus for marketing leadership of a destination is the DMO, then a critical understanding of the development of destination marketing by DMOs is vital to understanding the factors and circumstances that may constrain or facilitate the effective execution of their destination marketing function. In fact the marketing and promotion of destinations is now a ubiquitous activity, aided by the rise in new technological innovations such as social media which many destinations have harnessed in varying degrees (see for example Hays, Page and Buhalis, 2013 for a review of the rise of Web 2.0 and how DMOs have harnessed it).

2.1 Applied and fragmented nature of the destination marketing literature

Much of the initial stimulus for destination marketing emerged from the germane area of tourism marketing, its evolution the subject of excellent syntheses (see for example Gilbert, 1989) which provided the foundations for the development of this more specialised literature focused on the destination. In a subsequent review by Ritchie (1996), it was argued that tourism marketing research had been undertaken by those with a market orientation. Likewise, destination marketing research has by its very nature been undertaken by academics with an interest in applied studies that address relevant challenges faced by practitioners, rather than pure or basic research. There are a number of exceptions such as Ashworth and Voogd (1990) which made very clear distinctions about the contribution of geography to place-marketing: such studies argued that places are unique and their marketing was not a simple process of translating conventional marketing theory and practice derived from goods and services marketing, a feature reiterated in recent synthesis of the role events can play in transforming cities (Richards & Palmer, 2010). Other recent research on evolutions in service dominant logic and its application to marketing in tourism have

illustrated the shift in thinking towards co-creation and co-production in the way businesses and destinations can now engage with their customers (Shaw, Williams & Bailey, 2011). Despite these distinct geographical contributions to research on cities as destinations, it is evident as Malhotra (1996) argued that destination marketing research is generally concerned with the application of theories and techniques to identify and contribute towards solving marketing management decision problems. Thus, the field has been characterised by a fragmented applied research approach rather than theory building. Knight (1999), who identified a similar approach in the services marketing literature, suggested this is characteristic in the early development of many academic fields.

Certainly there has been a lack of conceptual ideas, as well as replication studies to re-test findings in destination marketing research. Ryan raised this issue on the TRINet discussion list (30/7/08), by citing comments made by Pearce in 1991 that there had been a general lack of comparative research in the tourism field. One possible reason for this is that there is little editorial journal space available for replication studies, though there is more recent evidence of a changing position at least in the case of destination image research in the key tourism journals in terms of replicating previous studies beyond individual case studies. Another plausible reason has been the nature of continuous change occurring in the tourism macro environment, stimulating new research directions. Few other industries have evolved as quickly as tourism has during the past few decades (Jafari, 1993). Many transformations have occurred within the tourism sector since the destination marketing literature commenced in the early 1970s, which have had wide ranging implications for DMOs. Among these changes were the introduction of jet aircraft, privatisation and the outsourcing of government services, the demise of communism, global recognition of sustainability issues, explosion in media channels, globalisation, disintermediation and online distribution, information communications technologies (ICT) and social media networking, the decline of the traditional passive all inclusive coach tour and the rise of independent travellers and travel packages, the rise of short breaks and emergence of low cost carriers and last minute discount pricing, and resurgence of cruising, backpackers, adventure travellers and ecotourism, dark tourism and medical tourism; and the rise of terrorism and ensuing security measures, all of which have stimulated research on the implications for destinations. In other words, many one-off studies have failed to yield an interconnected and critical body of knowledge that has contested and debated key findings as is evident in other areas of tourism that are

underpinned by a distinct disciplinary focus such as geography, economics or psychology. But perhaps more concerning for the emergent subject has been the lack of debate and analysis over key concepts and terms associated with the destination as a phenomenon as acknowledged by Fyall et al (2012).

2.2 Nomenclature and the DMO

Despite the key role played by destinations in any modelling of the tourism system, there is no widely accepted definition of the term *destination*. Most studies of the destination recognise the seminal contribution of Leiper (Hall & Page, 2010) in formulating many of the ideas that remain in current use in tourism research. In Leiper's (1979) model, a destination is a place the consumer travels to temporarily, from the region they reside in, creating a tourism flow (demand) in both time and space. Subsequent development of the destination concept expanded the distinction between the demand and supply perspectives identifying a critical role for the DMO in seeking to promote the destination to connect better the supply and demand aspects of tourism to maximise the use of destination resources (Pike, 2008). From the DMO supply-side the destination is defined by a political boundary, ranging from a continent, a country, a state, a province, to a city or town or even a specific micro scale place where there may also be competing industry-led groups seeking to promote a place or product-focus for a place. However, *destination* might be perceived quite differently from the demand perspective (Ryan, 1991), such as a geographic space in which a cluster of tourism resources exist. Thus the traveller's intended destination could be a precinct within a political boundary (e.g. Surfers Paradise in the city of Gold Coast, Australia), a political boundary (e.g. the state of Queensland, Australia), or cut across conventional political boundaries and/or be located along a touring route (e.g. the South Pacific). Dredge (1999) suggested any conceptualisation must therefore be flexible in a hierarchical structure that is adapted to suit different locations and markets. An in-depth review of the literature relating to the challenges in the conceptualisation of the *destination* has been undertaken by Saraïemi and Kylanden (2011), which explored the more critical debates now occurring.

It is important to state explicitly the focus of this paper is predominantly the academic literature relating to the operation, activities and interests of destination *marketing* organisations. This statement is in response to a recent trend by some academics to refer to DMOs as destination *management* organisations. The latter nomenclature is inappropriate

and potentially misleading when used as a blanket descriptor. The term *management* implies control, and the authors here argue that very few DMOs have either the mandate or resources to effectively *manage* their destination even though stakeholders in the broader tourism industries (Leiper, 2008) may implicitly assume or highlight this task when problems arise or are looking for destination leadership. Clearly this will depend upon the precise legislative or political framework established to guide each DMO, even though most are in a constant state of evolution as political decision-makers rethink their role. For example, England has recently witnessed a major change with the existing structure of tourism promotion redefined (see Page & Connell, 2009 for a detailed outline of the structure and funding of the DMO structure in the UK) as many regional and locally-focused DMOs have been abolished or their funding cut as part of public sector austerity cuts. Instead the development of Local Economic Partnerships has replaced the DMOs formerly funded by the Regional Development Agencies that were abolished. Now tourism is subsumed under a wider economic development agenda, as a partnership between local authorities and businesses, and it is their responsibility if they wish to assume any of the former DMO functions. In this respect, tourism as an economic driver of the economy has been downgraded from its former priority status under the RDAs to a position where it is effectively in limbo and destination marketing is an ad hoc activity determined by each LEP (or local authority) if they choose to assume this role. The major impacts of funding withdrawal, on DMO operations, by governments have been reported in the USA states of Colorado, California and Maine (Doering 1979, Donnelly & Vaske 1997) and the province of Waikato in New Zealand (Coventry, 2006, p.1).

The distinction between destination marketing and destination management

Wahab, Crampon and Rothfield (1976, p. 24) offered the first definition of tourism destination marketing:

The management process through which the National Tourist Organisations and/or tourist enterprises identify their selected tourists, actual and potential, communicate with them to ascertain and influence their wishes, needs, motivations, likes and dislikes, on local, regional, national and international

levels, and to formulate and adapt their tourist products accordingly in view of achieving optimal tourist satisfaction thereby fulfilling their objectives.

This definition however has been shown in practice to be idealistic. From a management perspective, DMOs are limited in what they can undertake and achieve in terms of management with many practical and logistical issues managed by local authorities (e.g. car parking, street cleaning, waste removal, control of crowds and visitors by the police during special events and environmental issues) as observed by Page and Hall (2003) in the context of urban tourism. Therefore, it is evident that destination marketers operate within the following confines as they:

- cannot change the official name or geographic boundary of the place they represent,
- have little if any control over the quality of the actual visitor experience relative to the promise made in marketing communications, including traffic congestion, graffiti, litter and crime,
- have little if any contact with visitors, to enable continued meaningful engagement in the pursuit of repeat patronage and are reliant upon survey feedback and the feedback from social media,
- have little control over the host community's acceptance of, and attitude towards visitors, particularly the role of tourism and civic pride as a mechanism to create a tourism-friendly environment,
- have little control over access issues such as bilateral airline agreements and development of airport, port, rail and road transport infrastructure,
- have little influence over the management of the natural environment and development/maintenance of land use zoning, infrastructure and superstructure,
- have no control over stakeholders' product development, pricing or marketing communications apart from when joint promotions are undertaken,
- are reliant on a small set of powerful intermediaries for packaging and distribution, and,
- arguably most importantly, are at the mercy of political masters and stakeholders for continuity of funding.

As Fyall (2011, p. 345) argued “...unless all elements are owned by the same body, then the ability to control and influence the direction, quality and development of the destination pose very real challenges”. For example, while Canada’s national, provincial and regional DMOs have evolved beyond a traditional promotion orientation, the nation’s tourism industry lacks destination management as “an integrated approach to destination management involving the country’s multiple stakeholders has yet to be developed” (Vallee, 2005, p. 229). In this regard, Plog (2000) predicted managed destinations, such as resorts and cruise ships, would become increasingly popular in the future due to their ability to manage capacity and maintain consistency of quality. Thus, using the term *Destination Management Organisation* as a generic descriptor is unhelpful in adding clarity and purpose to the discussion of the DMOs’ role because it confuses the perceived need for management with the largely marketing function they actually undertake. Therefore, whilst academics may create terms and offer an oversight of the problems facing destinations and the need for management, allocating their resolution to DMOs as management functions is clearly a different scope for a DMO (perhaps with a limited number of examples). This reflects the critical linkage which often exists between DMOs and the local authority in countries such as Scotland (Page & Connell, 2009) where a close working relationship is vital to the coordinated marketing and management of the visitor experience on the ground in specific destinations which the national DMO is unable to influence or control. Recently, Jenkins, Dredge & Taplin (2011) have lamented the lack of research relating to destination management. As a result, a DMO is an organisation responsible for the marketing of an identifiable tourism destination with an explicit geopolitical boundary. In fact the distinction between what the core function of DMOs are requires a fundamental rethink and focus on the underlying principles of marketing and how these are applied at a destination level.

Marketing is defined as: “a social and managerial process by which individuals and groups obtain what they need through creating and exchanging products and value with others (Kotler, Bowen & Makens, 1999, p. 12). This review therefore focuses on research into the key concepts inherent within this definition, as they relate to DMOs and their stakeholders. Excluded from the scope of this review is the wealth of research relating to destination *management* issues, which are not the responsibility of destination marketers but which are under the jurisdiction of government departments and ministries, conservation groups, developers, and private sector umbrella lobbying organisations.

The distinction between destination marketing and place marketing

Likewise the review does not seek to address the literature related to *place marketing*, in which tourism is but one of a broad range of sectors that constitute countries and cities, such as public policy and diplomacy, export trade, economic development, historical, sporting and cultural dimensions. The FutureBrand Country Brand Index is a good example, whereby it uses a Hierarchical Decision Model to identify how key audiences perceive a country brand measured in terms of: awareness, familiarity, association, preferences, consideration, decision/visitation and advocacy. In terms of association, one of the five elements measured is *Tourism*, examining value for money, attractions, resort and lodging options and food (FutureBrand, 2013). However, destination marketing researchers will of course find overlaps with the place marketing field of literature, and a key question of interest in this regard is to what extent does the reputation/stereotype of a nation or city, influence tourism destination brand perceptions, and vice versa? (see for example Martinez & Alvarewz, 2010). For a starting point in this field, readers are referred to the journal *Place Branding and Public Diplomacy*, which was launched in 2004, the 2002 special issue of the *Journal of Brand Management* (Vol. 9, Iss. 4) on 'nation branding', the forthcoming 2014 special issue on 'place brand equity' in the journal *Place Branding and Public Diplomacy*, texts by Ashworth & Voogd (1990), Kotler, Haider and Rein (1993), Ward and Gold (1994), Anholt (2003, 2010) and Ashworth and Kavaratzis (2010), and the annual Place Branding Yearbook by Go and Govers (2012).

3. EVOLUTION OF THE DESTINATION MARKETING ORGANISATION LITERATURE

While academic analyses of the evolution of DMOs have typically included chapters within historical reviews of tourism in different countries (Cushman 1990 and McClure 2004 on New Zealand, Furlong 2008 on Ireland, and Middleton & Lickorish 2005 on Britain), a limited number of individual destination studies refer to the role of DMOs or their predecessors (see for example Brown 1985, Stafford 1986, Russell & Faulkner 1999, Adamczyk 2005). The rise of a specialist journal, the *Journal of Tourism History* launched in

2009, now provides an opportunity for researchers to publish administrative histories of DMOs, since this a key stream of inquiry within historical research.

3.1 The first DMOs

It is thought the first destination travel guides were printed in France in the 16th century (Sigaux, 1966). The first places to have formal promotion agencies appear to have been at a local level. For example, in Switzerland, the first regional tourism organisation (RTO) was established at St. Moritz in 1864 (Läesser, 2000), while in England in 1879 the Blackpool Municipal Corporation obtained government permission to levy a local property tax for funding advertising of the town's attractions (Walton 1991, cited in Cross & Walton 2005). The first convention and visitors bureau (CVB) was established in the USA at Detroit in 1896 (Gartrell 1992, Ford & Peeper 2007). Then in 1901 the first world's first national tourism office (NTO) was established in New Zealand (NZTPD 1976, McClure 2004), and in 1903 the first state tourism office (STO) was launched in Hawaii (Choy, 1993). The number of DMOs grew considerably during the post-war period with many establishing their core marketing role in the 1960s and 1970s alongside the rise of the package holiday, introduction of jet aircraft and the rise of the holiday brochure (Laws, 1997) and the 1980s and 1990s saw the creation of many new DMOs as additional places recognised the value of a coordinated approach to destination promotion. It is not known how many DMOs now exist globally, although it has been estimated by McKercher there are now well in excess of 10,000 (see Pike, 2008).

3.2 The early influence of the railways

An interesting dimension to early attempts at collaborative marketing between private sector British railway companies and the advertising of holiday guides was evident from the posters that were developed from the 1930s and following nationalisation into the 1960s. Private sector railway companies in the UK competed for passengers by harnessing innovative forms of marketing – the railway poster. A number of railway companies commissioned Royal Academy artists to create place images of destinations that have been heralded as innovative as a mass form of tourism advertising. As Page and Connell (2010) indicated: “Hewitt (1995) outlines the approach taken to designing the LNER railway posters of the 1930s which portrayed the ‘joys’ of travelling to an East Coast resort. These posters were deliberately

colourful and lively, and when posted on the walls of drab streets or the London Underground would provide a stark contrast between ‘grey’ everyday life and the ‘colourful’ seaside just a tempting train ride away”. The important point here was the early use of visual means to evoke images of places to visit and the advertising follow up with guides available from the precursors of the DMO - local Town Council publicity and promotion departments (Watts 2004, Harrington 2004, Ward 1995).

3.3 Destination marketing texts

The establishment of the first DMOs predates the beginning of the academic field of destination marketing research by at least one hundred years. The first journal article appeared in 1973 (see Matejka, 1973), the first destination marketing text to be published was by Wahab, Crampon and Rothfield (1976), while the first comprehensive review was by Pike (2008). However, as shown in Table 1, there has been a plethora of books published in the past two decades that address various aspects of destination marketing.

PLACE TABLE 1 ABOUT HERE

3.4 Academic conferences on destination marketing

While this review focuses on journal articles, business reports and scholarly books, and not conference papers, it is important to note proceedings are available from at least 11 academic conferences that have focused on destination marketing, the first of which was in 1990. These are listed in Table 2. Separate conferences are held for tourism practitioners and academics, with generally little overlap in attendance. Academics are rewarded for publishing in journals and academic conference proceedings, and while some might engage with industry, either consulting or as members of local tourism authorities, there is little if any incentive to convert academic research into practitioner-friendly, open access research summaries. The WTO’s 2002 think tank on destination competitiveness was the first time practitioners and academics had met in a WTO forum on destination management (WTO, 2002). This is further evidence of the divide between destination marketers and academic researchers, which has been raised many times since the destination marketing literature commenced (see for example Riley & Palmer 1975, Jafari 1984, Taylor, Rogers & Stanton 1994, Baker, Hozie & Rogers 1994,

Selby & Morgan 1996, Hall 1998, Jenkins 1999, Ryan 2002, Pike & Schultz 2009). Indeed an important issue in any review of the tourism literature is the extent to which published research relating to practical DMO challenges is actually read by those practitioners who might benefit. This is part of a much wider debate now occurring in many countries about the impact of research and its reach and significance (HEFC, 2012). Following the 2002 forum, the WTO has since convened five further international conferences on destination marketing.

TABLE 2 ABOUT HERE

3.5 Industry reports

An interesting initiative by the UNWTO has been the commissioning of specific reports on destination marketing themes (see Table 3) as well as the attempt to engage a wider industry audience through its affiliate member programme given the growing significance of destination marketing as a distinct theme. This has also led to examples such as the UNWTO (2011) *Global Tourism Policy and Practice* report outlining the top 10 global tourism themes facing the international tourism sector, in which destination marketing features prominently. Other surveys and sources of research information on destination marketing appear either as surveys (e.g. www.simonanholt.com) as well as branding exercises such as the National Brand Index and City Brands Index. Yet these are comparative innovations in research compared to the historical evolution of the literature.

TABLE 3 ABOUT HERE

3.6 Journal special issues

According to Goeldner (2011) the earliest academic tourism journals were *Tourism Review* (1946), *Turizam* (1956), *World Leisure Journal* (1968), *The Cornell Hotel and Restaurant Administration Quarterly* (1960), *Journal of Leisure Research* (1968) the *Journal of Travel Research* (1972), and *Annals of Tourism Research* (1973). The first English language journal articles explicitly concerned with destination marketing emerged in the early 1970s by Matejka (1973), Gearing, Swart & Var (1974), Hunt (1975), and Riley & Palmer (1975), with the reference lists in these papers not alluding to any earlier studies. While it is not known whether the German and French language journals, such as *The Tourist Review* (first

published in 1946 and now known as *Tourism Review*), contain earlier studies, we have not sighted any references to any in the extant literature.

There have been at least 11 journal special issues on destination marketing, which are highlighted in Table 4. Additionally, in 2002 the *Journal of Brand Management* compiled a special issue (Volume 9, Issue 4) on nation branding, which featured two papers on destination brands. A 2005 special issue on tourism competitiveness (Volume 11, Issue 1) in *Tourism Economics* attracted two papers on destination competitiveness. Also, four articles in the 2011 *Journal of Hospitality Marketing & Management* special issue (Volume 20, Issue 7) on 'website evaluation' were concerned with DMOs, as were most of the papers in the *Journal of Travel Research* (Volume 38, Issue 1) special issue on 'war, terrorism, tourism', and the 2005 *Journal of Travel & Tourism Marketing* special issue (Volume 19, Issue 2/3) on 'tourism crises and disasters'. At the time of writing there was also a call for papers for a 2014 special issue of *Tourism Review* on 'destination leadership'. In 2012 the *Journal of Destination Marketing and Management*, was launched as the first dedicated to the field.

TABLE 4 ABOUT HERE

4. KEY THEMES IN THE DESTINATION MARKETING LITERATURE

A review of the contribution of a field to tourism usually focuses on a combination of continuity and change (Hall & Page, 2009). Following Reichenbach (1938), Hunt (1991) and Yadav (2010), a review of the development of a field should distinguish between the context of discovery and the context of justification. While the context of discovery is concerned with generating new constructs, or new relationships between existing constructs, the context of justification is concerned with the use of data analyses to accept these ideas. Yadav's analysis of three decades of publishing from major marketing journals found a sharp decline in the ratio of conceptual articles. This decline is attributed to four main causes; first, the ability, motivation and paradigmatic values of current researchers; secondly, the content and structure of doctoral programs focussing on specific methodologies; thirdly, the journal review process in terms of the type of papers likely to be accepted including the methodologies they employ; and lastly, the role of academic promotion, tenure and incentive systems that favour specific journals and paradigms. The destination marketing literature has

to date been concerned with justification of theories adapted from the wider literature in the fields of psychology, management, economics, marketing, geography, and sociology, with few attempts at theory development in line with the earlier evolution of tourism research.

Traditionally, marketing practise has been structured around the concept of the 4 P's, which was developed by Harvard University Professor Neil Borden (See Borden 1964, McCarthy 1975): product, price, promotion and place (distribution). This has been adapted in tourism and hospitality marketing to the 7 Ps or 8 Ps to include partnerships, people, programming and packaging (see for example Shoemaker & Shaw 2008, Morrison 2010). While destination marketers usually have an active interest in each of these, DMOs actually have limited influence over the practises of their destination's service suppliers, and external intermediaries, in relation to all but one of the 4 Ps. For example, the decline of tourism in outback Australia since the late 1990s has been attributed to a failure by destinations to adapt to changing market trends by rejuvenation of existing services and diversification into new products (Schmallegger, Taylor & Carson, 2011). See also Harris, Jago and King (2005) for a case highlighting the lack of control over service quality delivery by an Australian STO. Arguably the only area in these frameworks the destination marketer has control over is promotion of the destination by the DMO. It follows then that the focus of DMO activities lies in developing and leading collaborative marketing communication strategies that *match internal (destination) resources with macro environment (market) opportunities*.

The remainder of the review is based on the structure proposed in Figure 1. At the pinnacle is what we believe to be the quintessential goal of all DMOs, which is *sustained destination competitiveness*. Any attempt to achieve this requires two core elements, the first of which are resources that represent potential sources of comparative advantage. We promote the V.R.I.O. hierarchy for explaining how such resources can be classified. The second requirement is effective destination management. Common to both elements is the need for *effective organisation*. Again, it needs to be explicitly stated that the DMO makes a contribution towards competitiveness through marketing activities, and will only in rare cases actually be fully responsible for achieving this goal due to the lack of control. Destination marketing organisational effectiveness can be viewed from two perspectives: internal (appropriate and efficient use of resources) and external (effectiveness in the market). The

competitive nature of global markets necessitates the need to establish and hold a *leadership market position*, a feature which is assuming a growing significance for maturing destinations in OECD countries and the challenge posed by emerging destinations with lower production costs and innovative approaches to destination development (OECD, 2008). To assume a leadership role involves developing a *brand identity* and coordination of *brand positioning* marketing communications, the success of which require *performance measurement and tracking*.

PLACE FIGURE 1 ABOUT HERE

5. SUSTAINED DESTINATION COMPETITIVENESS

The rationale for the establishment of a DMO will usually have been to enhance destination competitiveness (Pike, 2004). One of the main reasons tourism communities need DMOs is that the overwhelming majority of tourism businesses are small family owned ventures employing less than ten people (Wason 1998, Page, Lawton & Forer 1999, Thomas et al 2011). All of these businesses are competing with each other, as well as against other destinations in a global market, for discretionary spending, against fast moving consumer goods and product brands that have budgets larger than any DMO. Thus, there is a need for an impartial coordinator to pool destination resources to create a bigger collective impact in the market. The vision/mission for the destination to be competitive, to enable stakeholders to prosper, subsumes all other goals and objectives, since, for any given travel situation, consumers are now spoilt by choice of available destinations. In the USA for example, Baker (2007, p.16) identified around 20,000 cities, 3400 counties, 126 America's Byways and 12800 National Historical Districts competing for visitor attention and spending. Internationally, almost 70 % of travellers visit only 10 countries, and so over 90 NTOs compete for 30% of total international arrivals (Morgan, Pritchard & Pride, 2002).

Yet competitiveness may be difficult to achieve and maintain, as has been evident in some developing countries such as in Eastern Europe (Davidson 1992, Hall 1999), sub-Saharan Africa (Brown, 1998), Jordan (Schneider & Sonmez 1999, Hazbun 2000), Ethiopia (Shanka

& Frost, 1999), Turkey (Okumus & Karamustafa 2005, Martinez & Alvarez 2010), and Cameroon (Kimbu, 2011). Also, there have been many examples of destination stagnation or decline in the tourist area life cycle (Butler, 1980) following a period of growth, including: Hamm in Germany (Buckley & Witt, 1985), Canada (Go, 1987), USA (Ahmed & Krohn, 1990), Majorca and Velencia in Spain (Morgan 1991, Amor, Calabug, Abellan & Montfort 1994), Rotorua in New Zealand (NZTB 1992, Rotorua District Council 1992, Ateljevic & Doorne 2000, Pike, 2007c), Bermuda (Conlin, 1995), Fiji (McDonnell & Darcy, 1998), Amsterdam (Dahles, 1998), Northern Ireland (Leslie, 1999), Spain (Bueno, 1999), Croatia (Meler & Ruzic, 1999), England's Torbay (English, 2000), Australia's Gold Coast (Faulkner, 2002), Lancaster Country, USA (Hovinen, 2002), outback Australia (Schmallegger, Taylor & Carson, 2011), and Portoroz in Slovenia (Rudez, Sedmark & Bojnec, 2011). In contrast, there are limited examples of destinations that have changed their fortunes in the tourist life cycle, such as Las Vegas, Torbay, and the Calvia Municipality in Mallorca (see Gilmore 2002, Pritchard & Morgan 1998, Buhalis 2000), by innovating and simultaneously developing diversified products and refurbishing and renewing its accommodation and attraction base (Baidal, Sanchez & Rebello, 2013).

Described as tourism's *holy grail* (Ritchie & Crouch 2000), the destination competitiveness research stream surprisingly only commenced during the 1990s. Recent literature reviews (see Mazanec, Wober & Zins 2007, Pike 2008) concluded there was no widely accepted causal model of destination competitiveness. The most comprehensive academic modelling to date has been that of Ritchie and Crouch (2003), Dwyer and Kim (2003), and Crouch (2011), while major industry modelling has been undertaken by the WTTC and World Economic Forum (2011, 2013). A long term view of competitiveness is paramount, and from a strategic planning perspective, *sustained* destination competitiveness requires two fundamental elements: i) resources representing sources of comparative advantage, and ii) effective destination management, most elements of which the DMO has no control.

5.1 Resources representing sources of comparative advantage

As has been stated, the focus of DMO activities is designing and implementing marketing communication strategies that match destination resources with market opportunities. A

destination resource can be viewed as anything that plays a major role in attracting visitors to a destination (Spotts, 1997), and more comprehensive listings of the range of potential destination resources can be found in Beerli and Martin's (2004) destination image research. As Aaker (1991) recognised, resources essentially comprise assets and human skills, a feature explored in detail by Pike (2008, p. 130). The starting point is a destination resource audit to identify existing resources that represent potential sources of comparative advantage in the various markets of interest to stakeholders. The literature relating to destination marketing resource audits, outside of the tourism planning field, has been scant (see Ferrario 1979a, 1979b, Pearce 1997, Spotts 1997, Faulkner, Oppermann & Fredline 1999, Ritchie and Crouch 2003, Denicolai, Cioccarelli & Zuchella 2010).

Resource audits are commonly used to identify *strengths* for a SWOT analysis, although little has been reported to guide DMOs on the criteria for determining whether or not a destination resource can be categorised as a strength. In this regard, the resource-based theory of competitive advantage promoted by Barney (1991, 1996) proposed four key considerations, operationalised in a V.R.I.O. hierarchy. Firstly, for a resource to be considered a source of *comparative advantage*, it must be 'valuable' in terms of either reducing costs or increasing revenue. Second, the resource should be 'rare', relative to rivals in the competitive set for a given travel situation. Third, the resource should not be 'imitatable' by rivals. Finally, for the resource to be considered a source of *sustainable competitive advantage*, the firm must be 'organised' to maximise marketplace impact. Barney proposed a hierarchy of resource competitiveness levels: 1) sustainable competitive advantage, 2) temporary competitive advantage, 3) competitive parity, and 4) competitive disadvantage. The practical value of the V.R.I.O. model is as a tool to determine those resources that should appear in the SWOT analysis/matrix as *strengths*. It is critical here to acknowledge that of all the resources at a destination, these will only realistically be limited to one or a few strengths. Essentially this is because of an inherent sameness creeping into many destinations through the effects of globalisation, and the ensuing difficulty in differentiating against rivals offering the similar attributes and benefits.

5.2 Effective destination management

Ritchie and Crouch (2000) used these concepts of comparative advantage and competitive advantage, when pondering whether destination *stars* are made or born. They offered the example of Russia, well endowed with natural resources but lacking in deployment, in comparison to destinations such as Singapore, Las Vegas, Branson and San Antonio, all of which had developed successful tourism strategies with limited endowed resources. Dascalu (1997) cited comments from a former Romanian Minister of Tourism concerned that his country had enormous tourism resources but that the tourism industry was under-performing. These resources may represent sources of comparative advantage but were not being used to achieve a competitive advantage. Another example of a country rich in resources, but which has failed to establish a competitive market position due to the absence of an NTO is Cameroon (Kimbu, 2011). Kimbu attributed the non-prioritisation of tourism by the government as a result of an electorally weak tourism sector. The same could be said of the USA, which at the time of writing did not have an NTO, although a common issue in the politics of tourism at government level is the low status often accorded to the tourism portfolio as a Ministry which is also reflected in the low prioritisation in cabinet budget rounds, or where it is part of a combined culture/leisure or economic development cabinet portfolio. It has been suggested the lack of USA Congress support for a national tourism office is a result of a strong political lobby arguing this would represent 'corporate welfare' (Gatty & Blalock, 1997). As wryly observed by Wanhill (2000), tourists are a valuable part of the tax base, but they are not voters.

Although there not yet a widely accepted model of destination competitiveness, from a review of the literature the critical success factors for an effectively managed and competitive destination can be summarised as the following categories (see see Ahmed & Krohn 1990, Poon 1993, Smeral 1996, Faulkner, Oppermann & Fredline 1999, Crouch & Ritchie 1999, Buhalis 2000, Goeldner, Ritchie & McIntosh 2000, Ritchie & Crouch 2000, 2003, Ritchie, Crouch & Hudson 2000, Rubies 2001, Australian Department of Industry, Tourism and Resources 2001, Smeral & Witt 2002, Fayos-Sola 2002, Kozac 2002, March 2003, Melian-Gonzalez & Garcia-Falcon 2003, Heath 2003, Dwyer, Livaic & Mellor 2003, Enright & Newton 2005, 2006, Vanhove 2006, Pike 2008):

- an attractive environment,
- profitable industry,

- positive visitor experiences,
- ongoing investments in new product development,
- a sustainable community,
- supportive host community,
- ease of access, and
- effective *organisation*.

The scope of this review is limited to the last topic where the issue of DMO organisational effectiveness is analysed from two perspectives. The first is internally, where audits are undertaken with regard to efficiency of resource use, meeting of objectives and appropriateness of activities. The second is externally, where DMO performance is considered in terms of effectiveness of activities in terms of impact in relation to market competitiveness.

6. DESTINATION MARKETING ORGANISATIONAL EFFECTIVENESS – (INTERNAL): EFFICIENT USE OF INTERNAL RESOURCES, MEETING OBJECTIVES AND APPROPRIATENESS OF ACTIVITIES

By far the more widely developed theme in the literature is the external focus on analysing the effectiveness of DMO marketing activities. That there has been less attention towards internal organisational effectiveness is probably because academics often find it difficult to gain access to the inner sanctum of DMO decision making. Yet as the authors readily recognise as consultants and employees of such organisations, many DMOs find it difficult to create meaningful Key Performance Indicators due to the nature of the ‘open’ system they operate in where tourism arrivals are not directly controlled or influenced by marketing spend. Yet this does not prevent the commonly cited measures of ROI expressed as marketing spend in relation to visitors generated.

It is not at all surprising that there has been little research reported that investigates the relationships between governance, organisation, strategy and achievement of DMO objectives to guide destination marketers on what constitutes an effective organisation (O’Neill 1998, Pike 2004). Contributions in this regard include: DMO goals (Hawes, Taylor

& Hampe 1991, Akehurst, Bland & Nevin 1993, Baum 1994), DMO performance audits (Faulkner 1997, Woodside & Sakai 2001, 2009), DMO roles (Pattinson, 1990, Choy 1993, Getz, Anderson & Sheehan 1998, Pike 2004, Cockerell, & Trew 2006), NTO performance indicators (Akehurst, Bland & Nevin, 1993), stakeholders' perceptions (Evans & Chon 1989, Donnelly & Vaske, 1997, Selin & Myers 1998, Wagner & Peters 2009, Bornhorst, Ritchie & Sheehan 2010, Dwyer, Cvelbar, Edwards & Mihalic 2012), RTO entrepreneurship (Ateljevic & Doorne, 2000), the role of the board (Gee & Makens 1985, Bowes 1990, Palmer 1998, Lathrop 2005), evaluation of NTO marketing plans (Faulkner 1997, Formica & Littlefield 2000), structure (Jeffries 1989, Lavery 1992, Morrison, Braunlich, Kamaruddin & Cai 1995, Pearce, 1996a, 1996b, Jenkins 2000, Kerr & Wood 2000, Lasser 2000, Rubies 2001), funding (Lavery 1992, Bonham & Mak 1996, Morrison, Bruen & Anderson 1998, Aguilo, Riera, & Rossello 2005, Harris, Jago & King 2005, Harrill & Bender 2007), legislators' perceptions (McGehee, Meng & Tepanon (2006), staffing issues (Sims 1990, McKercher & Ritchie 1997), evaluation of DMO information systems (Wang, 2008), RTO best practise (Cox & Wray, 2011).

Two decades ago it was claimed there had been little published about the structure of NTOs (Choy 1993, Morrison et al 1995), and that no widely accepted model for DMO structure existed. This is evidenced by the great variety of DMOs in existence, such as authorities, commissions, boards, tourist organizations, bureaux, tourist offices, corporations, departments, councils, ministries and the rise of QUANGOs (quasi-government bodies) (Morrison et al, 1995, p. 606). While there continues to be a raft of different DMO legal entities, there has been a general shift in the past 40 years from DMOs as government departments, and RTOs as private sector promotional cooperatives, to public-private partnerships (PPPs), which essentially involve government funding and private sector board members (Pike, 2008) and the QUANGO model where they are funded by government but not directly run as part of a government. Clearly, governance of such entities is a critical issue, since governments and their taxpayers need to ensure public funds are appropriately administered, and tourism stakeholders seek transparency and altruism in board decisions.

The nature of PPP entities means politics is therefore a major factor in DMO decision-making (see Ryan & Zahra 2004, Ryan & Silvano 2010, d'Hautesserre 2011). The tourism sector

comprises a diverse range of organisations and individuals who have differing levels of influence and who are involved in a complex array of relationships. However, the topic of tourism politics in the academic literature has been rare (see Hall 1994, Kerr & Wood 2000, Hollingshead 2001), and there have been calls for increased coverage of the study of the politics in tertiary tourism education (see Hollingshead 2001, Dredge 2001, Fayos-Solá 2002). Perhaps the seminal study here is Kerr (2004) with the resulting in-depth analysis of the ‘management of strategic failure’ in Scottish tourism an insightful theoretical and empirical analysis of the politics of tourism in one country, where the DMO received detailed criticism. Politics has been described as “the striving for power, and power is about who gets what, when and how in the political and administrative system and in the tourism sector” (Elliott, 1997, p. 10). A destination’s political environment includes ruling and opposition politicians, government funding agencies and other departments, bureaucratic cultures, competing entrepreneurs and special interest groups, the media, and the host community. Thus, destination governance lies at this intersection of public and private sector and community (Ruhanen, Scott, Ritchie & Tkaczynski, 2010). DMOs remain under constant review and threat from their principal funding sources in each country and so academic research that proves critical and undermines their arguments for additional funding due to poor performance or perceived lack lustre arrivals (even though they are not controlled by the DMO) mean wider academic scrutiny is rarely welcomed in a public setting; many reviews and assessments remain confidential to the client given the political challenge of maintaining a positive relationship at a distance from funding sources such as government or private sector. And so, research into the governance of DMOs remains limited, and currently there is no accepted model. Recent reviews of the governance literature (Beritelli, Bieger & Laesser 2007, d’Angella, De Carlo & Sainaghi 2010, Ruhanen, Scott, Ritchie & Tkaczynski 2010) found no agreement on what constitutes the dimensions for examining destination governance. Clearly the challenge for researchers remains gaining access to the inner sanctum of DMO decision making, to enhance understanding though an emic (insider) rather than more common etic (see Pike 1954, cited in Jennings 2001) research approach.

One of the critical responsibilities for the DMO board is ratifying strategy, and yet the academic literature relating to DMO strategy development appears to be scant (see Gilbert 1990, Long 1994, Kim, Crompton & Botha 2000, Smith 2003). Analysis of the contributions to date indicate an ad hoc and piecemeal approach that appears to be typical of the wider

destination field. Examples include: assessment of strategy development (De Carlo, Cugini & Zerbinì 2008), scenario planning (Hay & Yeoman 2005, Page et. al. 2006, Page et al 2010), crisis planning (Faulkner & Vikulov 2001, Litvin & Alderson 2003, Bierman 2003, Page & Yeoman 2007), critical success factors (Baker & Cameron, 2008), integrating sustainability in NTO strategy (Soteriou & Coccossis, 2010), forecasting (Vanhove 2005, Song & Li 2008, Goh & Law 2011), marketing information systems (Sheldon 1993, Tunnard & Haines 1995, Frew & O'Connor 1999, Buhalis & Spada 2000, Ritchie & Ritchie 2002, Mistilis & Daniele 2004, Wang 2008), marketing audits (Go, Milne & Whittles 1992, Faulkner 1997, Woodside & Sakai, 2001, 2009), case studies (O'Neill, 1998), and market portfolio modelling (McKercher 1995, Smeral & Witt 2002, Chen, Jang & Peng 2011). At least from a practical perspective, many DMOs at all levels now publish their strategies online, some of which are publicly available through Google Scholar. It is hoped that the open access to these online resources will provide a platform for researchers to develop a research agenda that will enable benchmarking of best practise in this area.

Both the design and implementation of DMO strategies require collaboration. Even though destination promotion from its very beginning has been collaborative in practise, this is a relatively emergent stream of research, much of it based on stakeholder theory (see Freeman, 1984). Work in this area has included: modelling collaborative marketing (Palmer & Bejou 1995, Beldona, Morrison & Anderson 2003, Wang & Xiang 2007, 2012), benefits of collaboration (Naipaul, Wang & Okumus 2009, Wang, Hutchinson, Okumus & Naipaul 2012), social inclusion (d'Angella & Go, 2009), intergovernmental collaboration (Wong, Mistilis & Dwyer 2010), stakeholder influence (Wang & Krakover 2008, Park, Lehto & Morrison 2008, Cooper, Scott & Baggio 2009), stakeholder interdependencies (Sheehan, Ritchie & Hudson 2007), collaborative innovation (Zach, 2012), and stakeholder management strategies (Sheehan & Ritchie, 2005). What has been lacking to date is the development of a comprehensive model drawing together the key themes, with which to guide practitioners through the minefield that is the attempted implementation of altruistic collaborative strategies with the myriad of stakeholders holding differing vested interests. In 2012, for example, Australia's national airline Qantas, withdrew its substantial financial contribution to joint venture marketing with the NTO, Tourism Australia, due to a perceived conflict of interest that the NTO chairman held. The NTO board chairman was a member of the board of a company attempting a buyout of Qantas.

7. DESTINATION MARKETING ORGANISATIONAL EFFECTIVENESS – (EXTERNAL): EFFECTIVENESS OF ACTIVITIES TO ACHIEVE A COMPETITIVE MARKET POSITION

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? As will be discussed, the largest body of work in the destination marketing literature has been the measurement of destination image, from recognition that images held by consumers influence their decision making. However an individual’s image of a destination is shaped by a myriad of organic and induced forces (Gunn, 1988), and two problems emerge when using destination image in the measurement of DMO effectiveness (Pike, 2008). First, in terms of *induced* efforts, a visitor might have been influenced by the marketing communications of a hotel, airline, NTO, STO, RTO, travel intermediary, or any combination of these; while conversely their perceptions might have been shaped *organically* through school geography lessons, a movie, actual visitation or word of mouth recommendations from significant others. Second, and related to the previous point, it is often difficult for the visitor to recall a particular marketing communication, or organically developed motives (see Crompton, 1979), which eventually led to their destination decision.

We mentioned previously the difficulty facing DMOs in identifying resources that will differentiate their destination from competing places offering similar attributes and benefits. Increasingly, DMOs have been moving into branding initiatives since the 1990s, in the attempt to achieve differentiation. While the topic of destination image has been popular in the academic literature since the 1970s, destination branding did not emerge as a field until the late 1990s. For insights into the history of the term *brand* and the development of connotative metaphors such as marketing warfare, see Pereira, Correia and Schutz (2012). The first academic conference session on destination branding was convened in 1996 (see Gnoth, 1998), and the first book was published in 2002 (see Morgan, Pritchard & Pride, 2002). The first journal articles were Dosen, Vransevic and Prebezac’s (1998) research based analysis of the appropriateness of Croatia’s brand, and Pritchard and Morgan’s (1998) case

study of the brand strategy for Wales. Since then, academic interest in the topic has increased exponentially, with the topic becoming one of the fastest growing in the destination marketing literature. For example, a review of the first 10 years of destination branding research (see Pike, 2009) identified 74 academic publications. Clearly, branding has become a key pillar in destination marketing for most DMOs, and case studies such as those presented by Crockett and Wood (1999) on Western Australia; Curtis (2001) on Oregon; Morgan, Pritchard and Pride (2002) on New Zealand; and, Pride (2002) on Wales indicate that destinations can be branded. Importantly however, it is not yet clear whether consumers actually regard destinations as brands. Despite the increased interest in destination branding research highlighted above, this is an issue that has to date generally been overlooked by researchers. Similarly, in the wider product branding literature Jevons (2005) observed: “the bottom line question that is often unasked is whether our understanding of what brands are, and what branding does, much clearer as a result of all the research that has been published?”

There has been a lack of consistency in defining what constitutes destination branding, both within industry and within academia (see Park & Petrick 2006, Blain, Levy & Ritchie 2005, Tasci & Kozak 2006, Nuttavuthisit 2007). The most comprehensive definition to date has been that proposed by Blain, Levy & Ritchie (2005, p. 337), which followed Berthon, Hulbert & Pitt’s (1999) model of the functions of a brand from both the buyer and seller perspectives:

“Destination branding is the set of marketing activities (1) that support the creation of a name, symbol, logo, word mark or other graphic that readily *identifies* and *differentiates* a destination; that (2) that consistently convey the *expectation* of a memorable travel *experience*; that (3) serve 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*.

It has been argued that the branding process for destinations is far more complex than that for consumer goods (Pike, 2005) for five main reasons. First, success is most likely when the range of differentiated features emphasised is limited to one or a few features or benefits (Aaker & Shansby 1982, Crompton et al 1992), and yet a destination usually comprises a diverse and eclectic range of features that must somehow be summarised into a seven word single minded proposition. Second, the market interests of the diverse and eclectic stakeholders are not homogeneous. Third, the politics of DMO decision making can make the best theories unworkable in practise. Fourth, destination marketers have no control over the actual delivery of the brand promise. Finally, the ultimate aim of branding is to stimulate brand loyalty, and yet DMOs rarely come into contact with visitors to enable meaningful post-visit engagement to stimulate repeat visitation. This section of the review follows the structure of the branding process (see Aaker, 1991), which comprises three key elements: the *brand identity*, which is the image aspired to in the marketplace for the brand; *brand image*, which is the actual image held of the brand by consumers; and, *brand positioning*, which represents the marketing communication attempts to achieve congruence between the brand identity and brand image.

7.1 Destination brand identity development

Cai (2002) was the first to distinguish destination brand identity development from image building. The brand identity represents the vision for how the destination should be perceived in the marketplace, with the aim of achieving differentiation. The concept of umbrella branding for macro regions such as countries and states to design an identity that will also subsume and suit regional brands has also been explored (see for example Crockett & Wood 1999, Curtis 2001, Flagestad & Hope 2001, Pechlaner, Raich & Zehrer 2007). A brand identity will include such components as values, key competitors, positioning statement, key attributes and benefits, and target audience. Within brand identity development there is a small but growing interest in testing whether the concept of a brand *personality* can apply to destinations (see Ekinci & Hosany 2006, Hosany, Ekinci & Uysal 2006, Murphy, Moscardo & Benckdorff 2007, Murphy, Benckdorff & Moscardo 2007, Ekinci, Sirakaya-Turk & Baloglu 2007, Pitt et. al. 2007, Usaki & Baloglu 2011, Pereira, Correia & Schutz 2012).

While little has been reported in the literature about modelling destination brand identity, many DMOs now publish their blueprint online (e.g. VisitScotland, Tourism Queensland, Tourism New Zealand). Such blueprints are intended to be a tool to aid the design of all marketing communications, not only by the DMO but also by stakeholders such as local businesses and travel intermediaries. However, designing a brand identity for a large entity such as a destination is not a simple process (Anholt, 2010). The key challenges lay in: i) effectively engaging the host community in the brand identity development, ii) agreeing on a focused direction with a diverse and eclectic range of active stakeholders, which is not only inspirational but also feasible, and then iii) harnessing their cooperation in collaboratively supporting the brand positioning required to communicate the brand identity. While research relating to the latter represents a major research gap, one example of this challenge was reported by Vial (1997, cited in Morgan & Pritchard 1998). The *Feast for the senses* brand developed for the Morocco Tourist Board for use in all markets. Previously, different campaigns had been used in different markets, which had resulted in a confused image. While the proposed campaign did gain the support of the tourism industry in Morocco, it was eventually derailed by resistance from foreign travel agents and tour wholesalers who viewed the campaign as promoting cultural tourism when they were in the business of catering to sun and sea packages.

While there is a rich resource of community-based collaboration in the tourism planning literature, modelling by Cai (2002, 2009), along with Koenecnic Ruzzier and de Chernatony (2013), provide rare insights into community collaboration in destination branding. In lieu of academic modelling of destination brand identity development are practical cases that highlight the need for i) the appointment of a brand champion/manager, ii) identification of the brand community, iii) market and resource audits, iv) a focused brand charter, v) motivation for stakeholders to support the brand identity. For a list of 26 such cases between 1998 and 2007 see Pike (2009), and more recently cases by Clark, Clark and Jones (2010), Wheeler, Frost and Weiler (2011), Zouganeli, Trihas, Antonaki and Kladou (2012), and Bregoli (2013).

7.2 Destination brand positioning

Destination positioning studies were not prominent in the first 20 years of the tourism literature (Grabler, 1997a), even though the concept had featured in the economics literature since the 1920s (Myers, 1992), and even though the first destination positioning journal article (see Goodrich, 1978) appeared in the early years of the emergence of the tourism literature. The concept was introduced to the advertising community as a marketing strategy in 1969 (Trout & Ries, 1979), and has been defined as “establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings” (Lovelock, 1991, p. 110). In Pike’s (2009) review of 28 research-based destination branding studies only three were explicitly focused on brand positioning analysis (see Nickerson & Moisey 1999, Shanka 2001, Kendall & Gursoy 2007). The majority focused on analysis of one destination. In Pike’s (2002, 2007a) reviews of 262 destination image studies published between 1972 and 2007, approximately half (129) examined the image of one destination in isolation, without reference to competing places. It is posited that that measuring destination image is limited in value to a DMO if the study does not also take into account perceptions held of key competing places, and so it is hoped future research will encompass this issue.

As implied in the definition of destination branding by Blain, Levy and Ritchie (2005) above, at the core of brand positioning is the destination’s name, logo and value proposition (slogan). The purpose is to succinctly convey the brand identity in a way that will stand out amidst the noise of other mass communications by rival and substitute brands and be noticed by the target consumer in a meaningful and memorable way. It has been suggested too many destination slogans have been less than memorable (see Dann 2000, Morgan et al 2003, Ward & Gold, 1994), and that best practise had been limited to a few simple slogans, such as the 1970s development of the ‘I ♥ New York’ campaign (Ward & Gold, 1994, p. 4): “The process of imitation, however, demonstrates a general paucity of creative ideas and effectively ensures that the vast majority of place promotional campaigns rarely manage to cross the threshold of ephemeral indifference”. However, the development of a proposition is arguably the greatest challenge in branding (Gilmore, 2002), and is particularly challenging for multi attributed destinations. Research into success criteria for destination brand slogans remains limited (see Richardson & Cohen 1993, Klenosky & Gitelson 1997, Shanka 2001, Pike 2004a, Lee, Cai & O’Leary 2006, Lehto, Lee & Ismail 2012). Although it is surprising that more research in this area has not been undertaken, given almost every destination employs a brand positioning slogan (eg for a table of global destination brand slogans see

Pike 2008, pp. 238-246), it should be noted there has been a lack slogan guidelines promoted in the wider marketing literature (see for example Supphelen & Nygaardsvik, 2002). In particular, studies would be welcome that analyse the extent to which one slogan is effective, in terms of meeting consumer wants, across the multiple markets of interest to the DMO's stakeholders; since a destination's image may differ between regional markets (Hunt, 1975) and between different segments (Fakeye and Crompton 1991, Phelps 1986).

Most of the day-to-day tactical operations of DMOs are spent designing, implementing, and monitoring marketing communications that attempt to communicate the brand position of the destination in the market as per the brand identity focus. Indeed, it is now an axiom that all marketing communications should reinforce the brand identity. There has been little research building on early work by Lawton and Page (1997), Santos (1998) and Gartner and Bachri (1999) into the extent to which DMOs and stakeholders adhere to this tenet, although analyses have been undertaken of destination images projected on postcards (Marwick 2001, Yuksel & Akgul 2007), on television travel shows (Hanefors & Mossberg, 2002), in travel guides (Schellhorn & Perkins 2004, Gorp & Beneker 2007) and in the general media (Santos 2004, Mercille 2005, Sadler & Haskins 2005, Xiao & Mair 2006, Custodio & Gouveia 2007).

8. DESTINATION MARKETING PERFORMANCE MEASUREMENT AND TRACKING

To what extent is destination marketing by DMOs actually working? A number of studies highlight the lack of market research undertaken to monitor the outcome of destination marketing objectives in Australia (see Prosser, Hunt, Braithwaite & Rosemann 2000, Carson, Beattie & Gove 2003), North America (Sheehan & Ritchie 1997, Masberg 1999), and Europe (Dolnicar & Schoesser, 2003). Sheehan and Ritchie's (1997) literature review found very little interest in DMO market performance measures, while Faulkner (1997) suggested most evaluations reported had been ad hoc. From a survey of local government tourism offices in Australia's state of Victoria, Carson et. al. (2003) suggested up to one third of shire councils lacked a system of performance monitoring for tourism objectives. In the USA as recently as the 1990s the issue was reported as being problematic. Pizam (1990) cited research indicating only a minority of STOs actually bothered to evaluate the effectiveness of their promotions. Likewise, Hawes et al (1991) found only 7 of 37 STOs used measurable objectives and

performance measures. In an examination of the Italian NTO's promotional plans, Formica and Littlefield (2000, p. 113) discovered the entire section on evaluation of the plan was missing: "Instead, spurious correlations often led to subjective evaluations of promotional performances". While there is no model to quantify the relationship between the work of DMOs time and destination competitiveness, research into market performance is generally spread across three themes: i) visitor metrics, ii) marketing communication effectiveness, and iii) branding performance.

Visitor metrics provide a degree of accountability, in terms of return on investment, and have been attempted by measuring a ratio of DMO marketing spend and spending by visitors from those markets (see Hunt 1990, Crouch, Schultz & Valerio 1992, Kulendran & Dwyer 2009), visitor spending (Aguilo Perez & Sampol, 2000), tourism expenditure growth and employment growth (Deskings & Seevers, 2011), and DMO technical efficiency (Pestana et al 2011, Medina, Gomez & Marrero 2012) despite the obvious weaknesses between cause and effect relationships in these metrics, marketing alone is not the sole determinant of arrivals in a destination as many established econometric studies of arrivals demonstrate. Length of stay is another key performance metric for destination competitiveness, but has been neglected in the tourism literature (Pearce 1977, Silberman 1985, Fakeye & Crompton 1991, Gokovali, Bahar & Kozak 2006, Martinez-Garcia & Raya 2008, Menezes, Moniz & Viera 2008, Barros & Machado 2010). To foster the development of global standards in tourism data collection the WTO (1995) produced a manual for the collection of tourism statistics by NTOs. The manual provides a comprehensive guide to a range of data issues, including: visitor surveys, measuring outbound tourism, measuring domestic tourism, describing tourism supply, and measuring economic costs and benefits of tourism. However, many countries, such as Australia for example, still lack a national standard of regional visitor monitors, by which to estimate visitor numbers, length of stay and origin of visitors. To guide Australian RTOs on regional data collection methods, the Centre for Regional Tourism Research established a web site (see www.regionaltourism.com.au), with one of the aims of the project being to progress the development of a national standard in data collection and reporting. One country that has had a national standard commercial accommodation monitor since the 1990s is New Zealand, undertaken by the government's Ministry of Business, Innovation and Employment (see <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/regional-visitor-monitor>).

The relationship between advertising and sales has yet to be established in the marketing literature (see Schultz & Schultz, 2004), and so it should not be surprising that this represents another important gap in the destination marketing literature. A number of studies have concluded the link between destination advertising and tourist receipts was tenuous (see for example Faulkner, 1997, p. 27). In addressing the question of whether destination advertising increases sales, Woodside (1990) found no published research in the tourism literature other than conversion studies. Faulkner's (1997) literature review identified a number of common methodological deficiencies in the application of conversion studies. However, conversion studies have been rare (see Schoenbachler et. al. 1995), as have experimental designs (see Walters, Sparks & Herington, 2007). The central problem is the difficulty in controlling for the range of extraneous variables, over which the DMO has no control, but which will be in play at the time of the advertising. For example, Hughes (2002, p. 158) discussed the difficulties in measuring the effectiveness of Manchester's gay tourism advertising campaign:

The campaign is ongoing and its success since 1999 has been difficult to assess given that, for obvious reasons, no record is kept of the number of gay and lesbian tourists, and even if there was it would be difficult to attribute any increase to any one cause.

Probably the most neglected area of DMO performance has been in relation to destination marketing and its impact on seasonality. Seasonality is described as a 'temporal imbalance' (Butler, 1994) in tourism and has remained a protracted problem for many destinations. It is one of the underlying reasons for modern day marketing to try and spread the peaks and troughs of demand so that assets can be better utilised in time and space. Whilst seasonality is a well documented theme in the literature (see Baum & Lundtorp 2001, Jang 2004), with a long history of development in the economic modelling of tourism (BaR-on, 1975), particularly in peripheral areas (Commons & Page, 2001), the role of public sector interventions to address seasonality have received limited attention, especially from the DMO perspective (see for example Spencer & Holecek, 2007), let alone research that examines the spatial variations within destination areas. This remains a an area of weakness for DMOs to demonstrate how intervention x^1 and the deployment of resources x^2 contributed to specific outcomes (y) in the short and medium term. Whilst marketing will be only be one component

of the wide gamut of factors affecting arrivals and seasonality, the influence of marketing activity and expenditure need to be more fully modelled and explored in relation to seasonality. Seasonality remains a constant management problem, which in the absence of a destination management organisation, is assumed as responsibility of the DMO via marketing activity.

Public relations and publicity performance measurement also remain problematic for DMOs. For example, Barry (2002) reported the finding of a survey of UK PR consultants, where one in five revealed they did not believe the success of their PR efforts could be measured. Trout and Rivkin (1995) argued most PR activities are 'name in the press' tactics, which are measured in the same way you measure chopped liver - by the pound! DMOs have tended to focus on this publicity aspect of PR measurement, where equivalent advertising value (EAV) has been a popular means for DMOs to monitor the results of their media activities, in the absence of more comprehensive approaches. EAV is a simplistic measure of the amount of advertising spend required to purchase the equivalent amount of air time or column centimetre generated by the by the PR initiative. As an example, for 1996-97 the Australian Tourist Commission reported EAV in excess of A\$675 million (ATC 1998, in Dore & Crouch, 2003). More recently VisitBritain estimated that the hosting of the London 2012 Olympic Games yielded £3.3 billion in positive advertising of Britain in print and on television between January and June 2012. Despite the shortcomings of EAV, the approach has been used by DMOs to argue the case for marketing funding, such as in the case of the Colorado Tourism Office, which has suffered a withdrawal of state government funding. For the year ending June 2003, the STO claimed EAV of US\$22 million through the placement of 1,172 media clips.

One of the fastest growing new evaluation topics in recent years has been related to the internet. Studies have included: web site success factors (So & Morrison 2004, Park & Gretzel 2007, Stepchenkova et al. 2010, Li & Wang 2010, Romanazzi, Petruzzellis & Iannuzzi 2011, Giannopoulos & Mavragani 2011, Tanrisevdi & Duran 2011, Tang, Jang & Morrison 2012), mental imagery processing (Lee & Gretzel, 2012), effects on destination image (Jeong et al., 2012), search engine marketing (Xiang et al. 2010, Pan et al. 2011), delivery of unique selling points through DMO websites (Vrana & Zafiropoulos, 2011). As

Hays et al (2013) illustrated, many DMOs' understanding and harnessing of the power of social media, especially Facebook and Twitter, is still emerging as the pace of change and evolution of social media use has been extremely fast, illustrated by a recent review of the field (Sigala, Christou & Gretzel, 2012). Other less reported performance effectiveness evaluations for DMOs include: the use of coupons (Woodside, 1981), direct response marketing (Burke & Lindblom, 1989), travel trade shows (Pizam, 1990), destination brochures (Zhou, 1997), media coverage (Castelltort & Mader 2010, Stepchenkova & Eales 2011) and promotional videos (Shani et. al., 2010).

8.1 Consumer-based brand equity (CBBE)

A decade after branding by DMOs appeared in the tourism literature, the concept of consumer-based brand equity (CBBE) was introduced as a potential means for measuring the performance of destination branding. CBBE was first promoted in the marketing literature by Aaker (1991, 1996) to supplement traditional balance sheet brand equity measures. The rationale for CBBE as a brand performance indicator is that consumer perceptions underpin any financial estimate of future earnings estimated in the financial measure of brand equity, the latter of which is of little practical value to destination marketers. The first destination CBBE journal article was published in 2006 (see Konecnik, 2006), and has since been followed by a small but increasing number of contributions (see Konecnik & Gartner 2007, Pike 2007, 2009, 2010a, Boo, Busser & Baloglu 2009, Kim et. al. 2009, Chen & Myagmarsuren 2010, Pike, Bianchi, Kerr & Patti 2010, Gartner & Konecnik Ruzzier 2011, Bianchi & Pike 2011, Im et. al. 2012). Figure 2 visually highlights how the CBBE hierarchy aligns with common DMO goals and the traditional *hierarchy of effects* of advertising effectiveness (see Lavidge & Steiner, 1961); and proposes how CBBE therefore also provides improved branding performance measurement and more transparent accountability to stakeholders, since performance measurement is about the extent to which brand image is congruent with the brand identity.

FIGURE 2 ABOUT HERE

At the foundation of the CBBE hierarchy is *brand salience*, which represents the strength of the brand's presence in the mind of the target. In the hierarchy of effects model, the first aim of advertising is to build awareness of the brand, which is clearly a common goal for DMOs. However, the goal should be more than achieving general awareness per se, but to be remembered for the right reasons (Aaker, 1996), as it has been shown awareness of a destination is not in itself a strong indicator of intent to visit (Milman & Pizam, 1995). Of the almost unlimited number of destinations available, individuals will limit serious consideration in the decision process to small set of four plus or minus two (Woodside & Sherrell, 1977). Destinations not positioned in the consumer's decision set are therefore at a competitive disadvantage. Top of mind awareness (ToMA), measured by unaided recall, is related to purchase preference among competing brands (Axelrod 1968, Wilson 1981, Woodside & Wilson 1985). Consequently, for the destination that first comes to mind when a consumer is considering travel, ToMA must represent a source of advantage (Pike, 2002b). However, there has been little research reported in the literature that empirically tests this proposition (Pike, 2006). A number of studies have found intent to visit was higher for destinations in the decision set (see Woodside & Sherrell 1977, Thompson & Cooper 1979, Woodside & Lysonski 1989, Goodall & Ashworth 1990, Goodall 1991, Crompton 1992, Pike & Ryan 2004, Pike 2006). In spite of the importance of this topic, research remains limited. Indeed a weakness of destination CBBE modelling to date has been the inability to capture unaided destination awareness in the form of ToMA/decision set composition. Due to the nature of structural equation modelling techniques used to test relationships between latent variables, destination brand salience has been measured using Likert type scales in relation to a named destination, which represents aided awareness. Schultz and Schultz (2004) have been particularly critical of the general failure by marketing researchers to link attitudinal data, such as stated preferences, with actual behaviour, through longitudinal studies. Likewise, Oppermann (1995) lamented longitudinal studies have rarely been reported in the tourism literature.

Another weakness in the literature related to destination brand salience is the lack of attention to date to the issue of *destination switching*, since the issue was raised by Ritchie and Ritchie (1998). For example, it is not known the extent to which a consumer will switch between destinations in the decision set due to issues that might occur at the time of decision making, such as awareness of better value packages or events such as natural disasters or terrorism.

An exploratory study in the UK (Wilson, 2002) found evidence short break holiday travellers would change their intended destination if a 'bargain' package to another destination became available. Research in this regard would enhance understanding of the phenomenon of destination substitutability (see Cohen 1972, p. 172, Phelps 1986, Gilbert 1990).

The second key construct in CBBE is *brand associations*, also referred to as images, attitudes and perceptions, which aid the consumer's information processing; and have been defined as "anything 'linked' in memory to a brand" (Aaker, 1991, p. 109). Destination branding strategies not only attempt to achieve this through marketing communications, but also by adding associations to the official place name, which in itself will usually have no explicit link to tourism attributes. For example, the official name of the town of Taupo in New Zealand is labelled Lake Taupo by the RTO, Lee County in Florida is promoted as Lee Island Coast, and in Australia, Queensland's Bargara is promoted as Bargara Beach (Pike, 2005). Only in rare cases has a place name been legislatively changed to suit tourism interests, such as the case of Elston in Australia, which was officially changed in the 1930s to Surfers Paradise (Pike, 2008, p. 230), and Hog Island in the Caribbean changing to Paradise Island (Ries & Trout, 1982). As consumers minds often struggle to cope with the daily flood of advertising and other media, the explosion in destination choice and destination publicity material has only served to increase confusion among potential travellers (Gunn, 1988). Jacoby (1984) argued that while consumers could become overloaded with information, they would not generally allow this to occur. Instead, coping mechanisms are developed. The need for simplified processing by the mind was explicit in the definition of image proposed by Reynolds (1965, p. 69) as "the mental construct developed by the consumer on the basis of a few selected impressions among the flood of total impressions". Literature reviews on the topic of memory structure (see for example Keller 1993, Cossens 1994, Cai 2002) have found the most commonly accepted conceptualisation has been the associative network memory model, which sees memory as consisting as nodes and links (see Anderson, 1983). A node represents stored information about a concept, and is part of a network of links to other nodes. When a node concept is recalled, the strength of association will dictate the range of other nodes that will be activated from memory. A destination brand is conceptualised as representing a node, with which a number of associations with other node concepts (attributes and benefits) are linked. In the hierarchy of affects model the second aim of advertising is to

increase familiarity with the brand through repeated exposure and strong associations with the product category (Keller, 2003), which is another common goal for DMOs.

At the 2000 Travel & Tourism Research Association (TTRA) conference in Los Angeles, John Hunt used the example of three peasants breaking in a new field, to describe the 1970s destination image research undertaken by himself, Edward Mayo and Clare Gunn. In the four decades since their pioneering work, the measurement of destination image has been the most popular topic in the destination marketing literature. The extensiveness of the field has been the topic of several reviews (see Chon 1990, Gallarza et. al., 2002, Pike 2002, 2007a, Tasci, Gartner & Cavusgil 2007, Stepchenkova & Mills 2010). The most popular themes have been the role and influence of destination image in buyer behaviour and satisfaction (Chon, 1990). Indeed, the images held by potential travellers are so important in the destination selection process that they can affect the viability of the destination (Hunt, 1975).

While it is clear that destination image plays an important role in travel decisions, understanding image formation remains a challenge. Another weakness in the modelling of destination CBBE in this regard is, again due to the nature of structural equation modelling, destination image has typically been measured with the use of only a few scale items. While this assists the ability of the researcher to test associations between the latent variables in the CBBE model, this approach does not measure destination image *per se*. There are a number of issues that complicate the measurement of images of large entities such as destinations. First, the extent to which consumers use an overall or composite image is not yet understood (see Mayo 1973, Dichter 1985, Gartner 1986, MacInnis & Price 1987, Stern & Krakover 1993, Baloglu & McCleary 1999). MacInnis and Price described imagery as a process of the representation of multi-sensory information in a gestalt. Discursive processing on the other hand is the cognitive elaboration of individual attributes. A key issue for destination image research is whether imagery or discursive processing is used to evaluate destinations (Echtner, 1991). Studies interested in measuring holistic impressions have included Pearce (1988), Um and Crompton (1990), and Reilly (1990). Second, a further dimension of destination image introduced by Echtner and Ritchie (1991) was the issue of common functional attributes versus unique and psychological features. Since most of the studies they reviewed required respondents to compare destinations across a range of common attributes,

there was little opportunity to identify any attributes that may be unique to a destination. They proposed a continuum between those common functional and psychological attributes on which destinations are commonly rated and compared, and more unique features, events or auras.

Third, while individual components of a destination's image may fluctuate greatly over time, their effect on overall image might not be influential (Crompton 1979, Gartner 1986). Gartner and Hunt (1987) found evidence of positive destination image change over a 13-year period, but concluded any change only occurs slowly. A study of the images of short break holiday destinations in Queensland, Australia found almost no changes over a four year period (see Pike, 2010). Likewise a study by the English Tourist Board (1983, cited in Jeffries 2002), which analysed the impact of an advertising campaign to modify Londoners' perceptions of Northern England over a three-year period, found only minor changes in destination image. Gartner (1993) proposed that the larger the entity the slower the image change. This is because images may only have a tenuous and indirect relationship to fact (Reynolds, 1965). However, whether an individual's perceived images are congruent with the brand identify is not as important as what the consumer actually believes to be true. This proposition continues to underpin consumer behaviour research, referred to as *perception is reality*, which originated from Thomas' theorem: "What is defined or perceived by people is real in its consequences" (Thomas & Thomas, 1928, p.572, cited in Patton 2002). This supports the proposition that it is difficult to change peoples' minds, with the easier marketing communication route being to reinforce already positively held images (Ries & Trout, 1981). This has implications for destination marketers considering changing brand positioning themes (see Woodside, 1982, Pike 2004), caused by issues such as though the influence of major attractions (see Ritchie & Ritchie, 1998), intermediaries (see Vial, 1997 in Pritchard & Morgan 1998), disgruntled stakeholders, new DMO marketing managers wanting to stamp their mark on strategy development (see McKercher & Ritchie, 1997), or political interference (see Russell, 2008). For example, Pritchard & Morgan (1998) and Slater (2002) have reported cases where legislation has necessitated DMOs changing advertising agencies after a set time frame.

Fourth, studies to date have tended to measure CBBE for one destination in isolation, which does not capture how the destination is positioned in consumers' minds relative to rivals in the competitive set. Fifth, other important issues warranting more research attention are the influence of *travel context* (see Snepenger & Milner, 1990) and *distance decay* (see Cooper & Hall, 2008) on destination image and decision making. To date, there has been little published in relation to travel context (Hu & Ritchie 1993, Gertner 2010). The majority of destination image studies have surveyed consumers' beliefs about a destination without specifying travel context; even though it has been posited that consumers might seek different destination attributes or benefits for different travel contexts, and therefore prefer different destinations for different travel situations (Pike, 2006), such as between a short break and a long summer holiday for example. Pike's (2002, 2007a) reviews of the destination image literature published between 1973 and 2007 found that from 262 publications only 37 with an explicit interest in travel context. Distance decay holds that demand declines exponentially as distance increases (see Cooper & Hall, 2008), and a number of studies have found that the profile and preferences of long haul travellers differs to that for short haul travel (see King 1994, McKercher & Lew 2003, McKercher 2008, McKercher, Chan, & Lam 2008, Pike, Bianchi, Kerr & Patti 2010, Bianchi & Pike 2011, Yan 2011, Ho & McKercher 2012).

If travel context and distance decay influence destination decisions, this has implications for the design of destination image questionnaires. First, the travel situation of interest should be explicitly stated. Second, the battery of destination image scale items needs to be tailored to suit the travel context and distance. In this regard, while questionnaires should be tailored to suit the target sample (Malhotra, Hall, Shaw & Oppenheim, 2007), only a minority of the 262 destination image studies tabled by Pike (2002, 2007a) used an exploratory qualitative stage to elicit salient attributes from consumers. The most common method of attribute selection has been through literature review, which runs the risk of being out of context. Related to this, other destination measurement weaknesses (see Pike 2007b, 2008a) include measuring the perceived performance of a destination brand across a list of attributes, without any measure of attribute importance, on the assumption that all attributes in the questionnaire will be important to the majority of participants; and the lack of inclusion of a 'Don't know' option for attributes, first raised by Gill (1947), particularly for long haul destinations, to mitigate the potential bias of uninformed responses. For example, of the 260 destination

image studies tabled by Pike (2002, 2007a, 2007b), only three of the studies employing structured questionnaires offered a 'Don't know' option for participants.

As a result, it is essential to distinguish between attribute importance, salience and determinance. The ideal for any product is to be perceived favourably on product attributes that are important to the target segment. Different terms have been used in the tourism literature to describe important attributes. Salience concerns the order in which features are elicited from consumers, where the most pertinent are offered first. Important attributes may be salient but not necessarily determinant. It is essential then to identify those attributes that determine product choice, to form the basis for any positioning campaign (Lovelock 1991, Ritchie & Zins 1978). Myers and Alpert (1968, p. 13) offered the first definition of determinance in the marketing literature as "Attitudes toward features which are most closely related to preference or to actual purchase decisions are said to be determinant; the remaining features or attitudes - no matter how favourable - are not determinant". Thus DMOs need research that identifies the small number of determinant attributes in target markets, for travel contexts, for which the destination is perceived positively.

Sixth, Fishbein (1967) and Fishbein and Azjen (1975) argued for the importance of distinguishing between an individual's beliefs and attitudes. While beliefs represent information stored about an object, attitude is a favourable, neutral or unfavourable evaluation. *Cognition* is the sum of what is known or believed about a destination, and also denotes awareness of a brand or feature. *Affect* represents an individual's feelings about an object, which will be favourable, unfavourable or neutral. It has been suggested that affect usually becomes operational at the evaluation stage of destination selection process (Gartner, 1993). However, the evaluative image component has been overlooked in tourism (Walmsley & Young, 1998). The majority of destination image studies have focused on cognitive attributes. For example Pike (2002) found only 6 of the 142 published destination image papers showed an explicit interest in affective images. Only recently have destination studies studied both cognition and affect towards destinations together (see Baloglu 1998, Baloglu & McCleary 1999, Dann 1996, MacKay & Fesenmaier 1997, Baloglu & Mangalolu 2001, Sonmez & Sirakaya 2002, Kim & Richardson 2003, Kim & Yoon 2003, Pike & Ryan 2004,

Kastenholz 2004, Baloglu & Love 2005, Konecnik 2005, Pike 2006, Hosany, Ekinci & Uysal 2006, San Martin & del Bosque 2008, Pike & Mason 2011).

Gunn (1988) suggested destination images were formed either organically or induced. Organic images are developed through an individual's everyday assimilation of information, which range from school geography readings, to mass media (editorial), to actual visitation. Induced images are formed through the influence of marketing communications. Gartner (1993) proposed a typology of image formation agents, ranging through a continuum of eight levels from Overt induced (advertising) through to organic (eg travel experience). Due to increasing use of publicity seeking techniques, organic and induced images may not necessarily be mutually exclusive (Selby & Morgan, 1996), since news is more voluminous than advertising and has higher credibility (Crompton, 1979). In this regard DMO promotion topics have included: advertising (Bojanic 1991), movie tourism promotion (Hudson & Ritchie 2006; Connell 2012), information and communication technologies (WTO 1999, 2001, 2008, Buhalis, Leung & Law 2011, O'Connor, Wang & Li 2011). Destination promotion topics that have received little attention include: de-marketing (Ashworth & Voogd 1989, Buhalis 2000), visitor relationship marketing (Pike, Murdy & Lings 2011, Murdy & Pike 2012) and ethics in DMO advertising (Campelo, Aitken & Gnoth, 2011). That the 2007 *Journal of Travel Research* special issue (Destination promotion) attracted 75 submitted manuscripts (see Fesenmaier, 2007), is an indication of the growing interest in the topic.

In addition to measuring destination image amongst consumers, the construct has also been analysed from the perspectives of: the host community (Schroeder 1996, Jutla 2000, Henderson 2000a, 2000b, 2007, Donald & Gammack 2007, Phillips & Schofield 2007, Merrilees et. al. 2007, Pike & Scott 2009, Choo, Park & Petrick 2011), local business stakeholders (Witter 1985, Wagner & Peters 2009, Bornhorst, Ritchie & Sheehan 2010, Garcia, Gomez & Molina 2012), the role of intermediaries and their perceptions (Gearing, Swart & Var 1974, Var, Beck & Loftus 1977, Ritchie & Zins 1978, McLellan & Foushee 1983, Teye 1989, Tang & Rochananond 1990, Roehl 1990, Walmsley & Jenkins 1993, Illum & Schaefer 1995, Oppermann 1996, Go & Zhang 1997, Grabler 1997a, Dimanche & Moody 1998, Lubbe 1998, Shanka & Frost 1999, Mohsin & Ryan 1999, Gartner & Bachri 1999, Chacko & Fenich 2000, Baloglu & Mangaloglu 2001, Morgan, Pritchard & Piggott 2003,

Baloglu & Love 2005, Konecnik 2005, Woodland & Acott, 2007, Sartori, Mottironi & Corigliano 2012), and even DMO staff (Illum & Schaefer 1995, Bramwell & Rawding 1996).

The highest level of the CBBE hierarchy is *brand loyalty*, which manifests in intent to visit, repeat visitation and word of mouth referrals. While repeat visitation is a key goal for DMOs, the topic of destination loyalty has been neglected until relatively recently (see Gitelson & Crompton 1984, Gyte & Phelps 1989, Oppermann 1997, 2000, Chen & Gursoy 2001, Bigne, Sanchez & Sanchez 2001, Litvin & Ling 2001, Rittichainuwat, Qu & Brown 2001, Niinen, Szivas & Riley 2004, McKercher & Wong 2005, Alegre & Juaneda 2006, Mechinda, Serirat & Guild 2009, Yuksel, Yuksel & Bilim 2010, Bianchi & Pike 2010, Croes, Shani & Walls 2010, Bosnjak, Sirgy, Hellriegel & Maurer 2011, Phillips et. al. 2011, Eusebio & Vieira 2011, Prayag & Ryan 2012, Forgas-Coll et al. 2012, McKercher & Tse 2012, Chi 2012, Moutinho, Albayrak & Caber 2012). The argument for stimulating repeat visitation and destination loyalty is clearly compelling, so it is surprising there has been little research to date addressing the practical challenges facing DMOs seeking to engage in *customer relationship marketing* (CRM). The development of ongoing relationships with selected customers will be a more efficient use of scarce resources and generate a greater yield over time than a continuous series of one-off transactions with new customers (Keller, 2003). Woodside and Sakai's (2001, p.378) meta-analysis of government tourism-marketing strategies concluded the dominant paradigm in use was transactional and not relational. Marketing activities are designed to attract new visitors, which might not necessarily be appropriate for potential repeat visitors: "No efforts or budget is planned for development of an ongoing relationship...database marketing is rarely being practised".

In addition to the destination CBBE modelling work we have already cited, a few studies have investigated destination loyalty from the demand perspective (see Alegre & Juaneda 2006, Chen & Gursoy 2001, Gitelson & Crompton 1984, Huang & Chiu 2006, Niinen, Svivas & Riley 2004, Yoon & Uysal 2005, Yuksel 2000), and behaviour patterns of repeat visitors (see Gyte & Phelps 1989, Oppermann 1997, Pyo, Song & Chang 1998, Lau & McKercher 2004, McKercher & Wong 2004). However, there has been little published to date about the supply side response to repeat visitation opportunities and challenges. In

highlighting the limited destination relationship management literature, Fyall, Callod and Edwards (2003) reported two case studies. Project Stockholm, an introductory cooperative campaign by an RTO, a hotel group and an airline, which targeted European weekend tourists; and the Barbados Club Program, a reward scheme that attracted 1700 members who had previously visited the island at least 25 times. The key unique CRM challenge faced by DMOs is that they rarely come into contact with visitors, and so the development of a contact database (see for example Truman, 2006) is problematic. Additionally, and common to all organisations developing a CRM strategy is the difficulty in engaging with the *individual* consumer in a way that will be meaningful to them; as opposed to a standardised broadcast email. These problems have been highlighted in a study of RTOs in Queensland, Australia (Pike, 2007) and in a global study of a small sample of DMOs (Pike, Murdy & Lings 2011, Murdy & Pike 2012).

Almost all of the destination CBBE publications to date have used structural equation modelling techniques, which while advancing our understanding of the importance of, and relationships between, constructs, have limitations. There is a need to explore other techniques that enable a less constricted approach to analysing relationships between destination salience, associations and loyalty. We have already mentioned the problems associated with attempting to measure salience and associations with SEM. Indeed, critics of SEM techniques (see for example Mazanec 2009, McKercher 2009) suggest the over reliance on such modelling, often justified because others in the field have used them, have resulted in nonsense applications that, while statistically significant, do little to enhance theoretical progress. There is also a need to debate what is the dependant variable in such modelling.

9. CONCLUSION

The purpose of this paper was to provide a narrative analysis of the first forty years of destination marketing literature with an explicit focus on the core marketing role of DMOs. Since the first journal article appeared in 1973, research into destinations has assumed a prominent position in the tourism literature to the point that a destination marketing paradigm now pervades the subject as a specialist aspect of its antecedent – tourism marketing (Gilbert, 1989). The analysis was challenging due to the sheer breadth of material that has been

published in four decades and the absence of any previous reviews. We have structured the literature around the key themes that DMOs are involved with in the pursuit of destination competitiveness given that this is now a core objective of not only promoting the destination, but in maintaining its long-term sustainability in terms of markets. As this is still a relatively young field of research, each of these key themes has opportunities for academics to continue to make contributions, to enhance our understanding of what constitutes effective destination marketing. We make no predictions about the future of research in this field, since the history of destination marketing research is no predictor of the future. Rather we focus on existing gaps, which are likely to attract the attention of researchers in the short to medium term. As well as the many research gaps we have highlighted in the paper, our review of the destination marketing literature has identified the following research opportunities:

To what extent is the DMO is responsible for the competitiveness of the destination?

This remains a prominent and enduring theme which concerns not only DMOs but politicians with the increasing investment in world cities in terms of attracting inward investment. The cultural industries, of which tourism is a part, are increasingly seen as a dimension of the attractiveness of the city as place to work, live and play, where hosting events has sought to compete aggressively for visitors as recent reviews of the role of events has demonstrated (Page & Connell, 2012). The role the DMO plays in marketing and leveraging the benefit of event activity is a major research strand to be examined further and its ability to enhance the uniqueness of the destination, extending the recent work on the eventful city (Richards & Palmer, 2010).

How can we quantify the success of DMO promotional activities over the long-term?

Here a vital role is in linking research in finance, management and accountancy with DMO research to derive more robust and credible measures of organisational performance that reflect the changing world of DMO competitiveness.

To what extent is the success of individual businesses reliant on destination competitiveness?

With the complexity of the destination offer and its promotion and articulation thorough branding and other modes of communication (e.g. social media), future research will need to start assessing the synergies and critical relationships which exist between businesses and the DMO. It may also be useful to monitor the way DMOs are increasingly being expected to engage in and undertake some destination management functions and a leadership role to enhance business performance.

To what extent is the academic literature impacting on current best practise of DMOs?

This remains a controversial area given the gap between academic research and its limited penetration into the practitioner field even though it has a growing importance to the new destination marketing activity around social media and its impact upon visitor behaviour. As noted in the review, the issue of the academic/practitioner divide in tourism research has been lamented by a number of scholars (see Riley & Palmer 1975, Jafari 1984, Taylor, Rogers & Stanton 1994, Baker, Hozie & Rogers 1994, Selby & Morgan 1996, Hall 1998, Jenkins 1999, Ryan 2002, Pike & Schultz 2009). A key question that needs to be asked is ‘for how many academics is ‘engaged scholarship’ (see Van den Ven, 2007) *officially* recognised for purposes of legitimacy such as tenure, promotion, and academic survival’? Van den Ven cited research demonstrating how practitioners have failed to adopt research findings in a number of fields such as medicine, human resources and social work, and pointed to concerns about the growing divide between management academics and practitioners. A major criticism is that academics have retreated to the ivory towers, valuing their autonomy over engagement. There is a need for research exploring this issue in tourism research, as noted by Pike & Schultz (2009: p. 327):

Of the 5,000 plus tourism academic contributors referred to by McKercher, how many have disseminated their findings to practitioners by way of a presentation or report? How many have attended a recent tourism industry conference? What incentive is there to do either? Why are there so few conferences attracting a good representation of academics and practitioners? What other means of engagement are used by academics to situate and ground the research problem from the perspective of those people who experience it in the field? If we are not bridging the divide and engaging with industry, how do we know our research is relevant and our recommendations

are being implemented or whether they work? Or is publishing in academic journals the end game, in the hope that somehow the findings will make their way to the frontline?

To date there have only been a small number of contributions as practitioner authored or co-authored books (see for example Bierman 2003, Baker 2007, 2012, Pike 2004, 2008, Ford & Peeper 2008), edited volumes (See Morgan, Pritchard & Pride 2002, 2004, 2011, Harrill 2005), and journal articles (see Crockett & Wood, 1999, Curtis 2001, Frisby 2002, Morgan, Pritchard & Piggott 2002, 2003, Yeoman, Durie, McMahon-Beattie & Palmer 2005, Pike & Mason 2011, Pike, May & Bolton 2011). The destination marketing literature would benefit from the insights of more practitioner/academic collaborative cases epitomised by the UNWTO (2011) study, and tourism journals might wish to add a section devoted to brief practitioner notes that outline relevant practical problems requiring academic inquiry. For example, an email from VisitEngland's Research & Insights Team, forwarded to the TriNET listserv (23/1/13), explicitly called for academic interest in the NTO's research programme (see <http://www.visitengland.org/insight-statistics/more-about-our-work/our-work-programme>):

In addition to the team's core work programme, there are many other areas of research that are relevant to the organisation and to the Strategic Framework for Tourism in England, which we are not in a position to address by ourselves. We believe that some of these may well align with academic research programmes, and so we are keen to explore opportunities to work with Universities to bridge the gaps we have identified.

At a more abstract level, and building upon the field of political research, in-depth case studies of the politics of governance and strategic decision making are certainly of interest to learn what works well and what does not using the approach of recent stories of practice model of tourism policy and planning by Dredge and Jenkins (2011). This may help inform the need to develop clearer models of DMO governance that reflect best practice in the sector. A controversial proposition here which needs to be better understood is the extent to which visitor relationship marketing can be used to stimulate increased loyalty and repeat visitation. In particular, we need to critically evaluate how it is possible for DMOs, who have no direct contact with visitors, to engage in meaningful dialogue to stimulate repeat visitation

and destination loyalty? Part of this agenda is about understanding the extent to which consumers engage in destination switching during decision making as well as the influence of engaging in social media such as consumer-driven net communities and the effect on consumers who are engaging in destination switching during the decision process. One dimension here that remains hitherto unexplored in destination switching is the influence of the reputation/stereotype of a nation and how it impacts upon on destination image.

In calling for a new *paradigm* in destination marketing, Heath (1999) promoted the need for destinations to move from broad based marketing to more targeted and customised positioning. In this regard there is a need for conceptual thinking that links the disparate themes into a more cohesive and holistic DM paradigm. Thomas Kuhn's original thesis on paradigms was as science operating within a largely unquestioned framework, governed by fundamental theoretical models (Gregory, 1987). When a theory is accepted it becomes a paradigm until it is challenged in the form of a revolution. As yet, there is no accepted alternative to the dominant 4 Ps paradigm for destination marketing. As a result, and as discussed in the introduction, a key challenge in this review was in designing a structure that would encompass the diversity of topics in the destination marketing field. As the thinking around DMO roles matures, it would not be inconceivable to see research considering the development of an alternative to the 4 Ps marketing paradigm for DMOs, especially for those destinations embracing the branding ethos as a philosophy to assess performance relative to competitors. Consequently, research on destination brand performance measurement will need to develop its understanding more fully of what constitutes the dependent variable. Part of this new research activity might wish to focus on case studies of brand identity development as well as destination brand umbrella strategies along with developing our understanding of how destinations are able to generate different brand positioning strategies to suit the needs of different markets. Additionally, to what extent does the marketing communications of the DMO and key stakeholders align with, and therefore support the, brand identity? Given the level of investment in brand development globally, insights are required into the links between branding theory and practise.

An important consideration in the DMO paradigm is such organisations are not in a competitive position. Destinations compete against other destinations in competitive markets

but the DMO is not competing. Rather, they are like a regional hospital that is the only such organisation in town. In the private sector, poorly managed firms go out of business. We suggest the paucity of research into DMO best practise is related to the lack of agreement, within academia and in practise, as to what is the dependent variable in modelling of DMO performance. One of the many research gaps identified in this review is destination governance. This is an important issue for tertiary education. Politics is no place for the feint hearted, and following Fayos-Sola (2002) it behoves tourism educators to develop an enhanced understanding of the complexities and practical challenges in destination decision making, and to disseminate this knowledge to students as future employees in the tourism system. Regardless of where in tourism a student has ambitions for, their career will at some stage expose them to interactions with DMO staff, and possibly to conflicts between the DMO and developers, entrepreneurs, conservationists and disaffected residents.

These new agendas also need to be accompanied by continuity in research which simultaneously models destination image and destination competitiveness alongside case studies of marketing communication effectiveness. Clearly these research agendas have a key role of collaboration with DMOs and the tourism sector and building stronger working relationships with such bodies over time will help to shape the reach and significance of the research so as to have a wider public good than is currently the case. Destination marketing has a major growth potential as a subject area both in niche journals but also in the mainstream tourism and business journals. This review has only been a partial analysis of this impressive growth and transformation of the subject from tourism marketing per se to a more specialist focus on destination marketing. There is certainly considerable scope for empirical and theoretical development to move the subject forward whilst engaging with the new research agendas in social science to invigorate the intellectual contribution it can make to the further development of the destination marketing literature.

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