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Department of Transport,
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Tourism Marketing Fund

Value for Money and Policy Review

Appendix 2: Literature Review

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Literature Review

Destination marketing is now acknowledged as a pillar of the future growth and sustainability of tourism destinations in an increasingly globalised and competitive market (UNWTO, 2011). Published research related to destination marketing represents an important growth area in tourism that has become a distinct paradigm (Bowden, Fidgeon & Page, in press), and its significance is reinforced by four key propositions that are associated with global tourism:

1. Most aspects of tourism take place at destinations (Leiper, 1979);
2. Destinations are "the fundamental unit of analysis in tourism" (UNWTO, 2002);
3. Destinations have emerged as the biggest brands in the travel industry (Morgan, Pritchard, & Pride, 2002); and,
4. 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 (Fyall, Garrod, & Wang, 2012; Want & Pizam, 2011), it is the highly competitive business of attracting visitors to localities. While this in itself is not a new activity, the scale and extent activity is new, as acknowledged by Ashworth and Page (2011) in relation to urban tourism but which is true of all types of destinations. Key themes throughout the destination marketing literature include the challenges posed by 'Overtourism' and 'Tourismphobia', the difficulty in evaluating the activities of DMOs, the growth of 'Sustainable Tourism' and of cruise ships, and the advantages of putting local people first and thereby encouraging their buy in to DMO campaigns. Visiting Friends and Relatives (VFR) travel is discussed as a key market for which the goodwill of the host population is invaluable.

1.1 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 (Cai, Qui, & Li, 2007; Pike, 2004a) and the leadership of stakeholders associated with 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-Molinar, & 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 ubiquitous, aided by the rise in new technological innovations such as social media which many destinations have harnessed to varying degrees (see Hays, Page, & Buhalis, 2013 on how DMOs have harnessed online tools).

The study of the marketing of tourism destinations to overseas markets forms a distinct niche within the overall tourism marketing literature. DMOs now operate widely at different geographical levels (national, regional or city) and these organisations act to promote their destination, helping it to compete and attract visitors from international markets. In the Irish context, Tourism Ireland and Fáilte Ireland are the effective DMOs (DTTAS, 2015, p.15) with DTTAS providing a policy and regulatory framework for tourism activity (Dore and Crouch, 2003, p.137). Following their review of forty years of tourism marketing literature, Pike and Page (2014, p.217) conclude that destination marketing is still a "relatively young field of research", with many research gaps highlighted by the authors as needing further exploration.

There is currently a dearth of comparative analysis of DMO overseas marketing performance. In 1994 the World Tourism Organisation reported difficulties in comparing DMO performance, caused by differences in budget structures across countries (Dore and Crouch, 2003, p.141). As for individual DMOs, the Australian Tourist Commission reports that its Visiting Journalist Programme provided US$500m worth of publicity (in terms of equivalent advertising cost) and 1,200 media visits in 1999, and that this figure had risen exponentially from less than US$50,000 and less than 500 visits in 1989 (ibid, p.147), although comparison of these figures with pre-specified objectives or the performance of other DMOs is absent. Even as recently as 2014, Pike and Page (2014, pp.212-3) report that a lack of monitoring and evaluation remains a widespread and long-standing issue for tourism authorities at both regional and national levels.

A number of potential measures with which to evaluate DMO performance are proposed across various sources. The Department's Tourism Policy Statement (DTTAS, 2015) provides three high-level key performance indicators (KPIs) applicable to tourism:

- Overseas tourism revenue – DTTAS aims to grow revenue to €5bn at 2014 prices by 2025, or approximately 5% annual inflation-adjusted growth;
- Overseas visits – DTTAS aims to grow visits from 7.6 million in 2014 to 10 million by 2025 – average annual growth of 240,000; and,
- Sectoral employment – DTTAS targets growth from around 200,000 in 2014 to 250,000 by 2025 – average annual growth of around 5,000.

With regard to overseas destination marketing expenditure more specifically, Pike and Page (2014, p.213) report the following as examples of visitor metrics employed in previous studies:

- The ratio of DMO marketing expenditure to expenditure by visitors from those markets;
- Visitor expenditure more generally;
- Tourism expenditure growth and employment growth;

- DMO technical efficiency; and,
- Length of stay.

Dore and Crouch (2003, p.147) provide a table of commonly used evaluation techniques for publicity programmes, including quantitative estimates of the total audience reached by the publicity, the equivalent cost of column inches filled by printed material, etc. along with qualitative assessments. The authors describe most of the measures, particularly the simple attribution of overseas visitor numbers to the effects of the programme, as "very limited in their accuracy and reliability" (ibid).

A common theme among authors involves warning of the danger of unjustified inference from limited quantitative indicators. Basic visitor metrics such as those listed above cannot be used to answer the question, "did the government's tourism-marketing program generate visits that would not have occurred without the program?" (Woodside and Sakai, 2001, p.377). Along with marketing expenditure by DMOs, multiple factors such as potential tourists' income levels, the relative prices of substitute tourism options in origin and rival destination countries, transport costs, exchange rates and one-off events can all influence the demand for tourism (Dwyer et al., 2012). Without a quasi-experimental evaluation designed to control for these factors, the specific marginal change in tourism purchasing outcomes cannot be identified. There is also a temporal issue: the effect of marketing may occur over an elongated period of time, such that the final purchase decision occurs at some unspecified time years after the initial marketing expenditure, preventing clear identification of a causal effect. Analysis which attributes changes in visitor numbers or similar metrics entirely to the effects of marketing are based on "spurious correlations" (Pike and Page, 2014, p.213) and can lead to upward-biased estimates of marketing effectiveness (Dore and Crouch, p.147). They also constitute what Morgan et al. (2012, p.75) describe as analysis of what can be measured, rather than what should be measured. According to these authors, many conventional assessments of DMO performance involve statistics reported because of their availability and consistency with previous efforts, much more than their ability to precisely answer the relevant questions.

The overall picture from the literature is that "in practice, evaluating the effect of [DMO] activities on a destination's tourism performance is especially problematic" (UNWTO, 2003, p.12). Pike and Page (2014, p.213) report that no firm relationship between advertising and sales has been established in the marketing literature generally, let alone tourism marketing; that previous work has "identified a number of common methodological deficiencies in the application of conversion studies"; and, even so, conversion studies and experimental designs were rarely undertaken. The identification of a causal link between deployment of resources and explicit outcomes "remains an area of weakness for DMOs" (ibid). The authors even go so far as to suggest that the lack of existing research and analysis of DMO best practice is due to disagreement "within academia and in practice, as to what is the dependent variable in modelling of DMO performance" (ibid, p.218) and are not alone (Dore and Crouch, 2003, p.149) in calling for further research into accurate and reliable indicators with which DMO performance can be measured.

A new evaluation framework and KPIs developed by Visit Wales (Morgan et al., 2012) offers some hope for effective performance assessment of overseas destination marketing into the future. The new indicators were designed to be relevant for the modern tourism marketing paradigm, which has been the subject of rapid increases in the use of online platforms and consequent active input of tourism consumers to the marketing process. Previous KPIs such as cost per inquiry (CPI) and revenue per inquiry (RPI) (Woodside and Sakai, 2001) were based on responses given by consumers through traditional 'fixed' channels (e.g. written brochure requests). As internet use has become dominant, consumers are now able to conduct their own destination research, respond to marketing through channels other than traditional ones, and to dictate the terms of this activity (Morgan et al., 2012, p.76). The new KPIs also focus specifically on outcomes which are more directly relevant and for which causality can be more easily identified. These include the ability of potential consumers to recall (prompted and unprompted) advertising campaigns, 'emotional proximity' (i.e., how warmly respondents regard a destination), and combinations of KPIs to track the movement of prospective consumers through the so-called 'purchase funnel', from initial interest to final purchase decision and visit. These stages of the decision-making process are much more clearly influenced by marketing than final outcomes which were measured by previous 'conventional' KPIs such as numbers of visits, expenditure, and length of stay at the destination, and may provide equally valid objectives for DMO performance evaluation (UNWTO, 2003, p.13).

European Cities Marketing (ECM) publishes an annual 'European Cities Marketing Benchmarking Report'. This document is intended as a tool for DMOs and other organisations in the destination marketing sector to evaluate their performance and to monitor trends within the industry. Data is gathered via an online platform- TourMIS (first developed by the Austrian National Tourist Office) onto which DMOs upload tourism statistics for the benefit of all members. The most recent report covering 2017-2018, featured 126 European Cities (ECM, 2018). The ECM relies on a staff member in each participating DMO to upload their data annually. This data includes bed nights and bed night capacity, and members must have at least 5 years of data available to participate, as the report presents times series data over a 5 year period (ECM, 2011). The utility of this data is constrained by the aforementioned difficulties in attributing outcomes to the activities of the DMO, but it is still a valuable source of comparative data for DMOs. The indication of a city's ranking in comparison to comparable counterparts may be a good indicator for the broad success of a strategy which other destinations can look to for effective marketing activities.

1.2 Target Markets in Destination Marketing

Railway posters, depicting artists' impressions of British coastal towns, were some of the earliest outputs of destination marketers. Developed in the 1930s, these lively images were heralded at the time as innovative examples of mass tourism advertising (Pike and Page, 2014, p.11). However as the field evolved, destination marketing has gradually utilised increasingly targeted, niche marketing alongside more traditional 'broad based marketing' methods. This 'new paradigm', first heralded in the late 1990s (Pike and Page, 2014, p.46), is exemplified by marketing campaigns by DMOs which focus on specific target markets.

The Gathering, credited with attracting 200,000-250,000 additional overseas visitors in 2013, was Ireland's largest ever tourism initiative (Fáilte Ireland and Fitzpatrick Associates, 2014, p.i). Delivered through a partnership between Fáilte Ireland and Tourism Ireland, the Gathering was inspired by a similar Scottish campaign 'Homecoming Scotland'. Both campaigns focused on targeting the diaspora market (Fáilte Ireland, 2013, p.8). Although the campaign also aimed to appeal to, or at least not discourage other markets, the Gathering pursued a nuanced strategy designed to appeal to the distinct needs and sentiments of the diaspora population. Initiated during a time of recession, the Gathering inspired enthusiasm and support from many. Many businesses may have been motivated to harness the potential for increased revenues from tourism (Fáilte Ireland, 2013, p.21-24), and a key success of the Gathering was its effect of attracting many overseas visitors to many destinations which would not typically be associated with tourism. A key driver of this success was the strong buy in from local authorities, whose leadership helped to facilitate an unprecedented number of events. While national events attracted visitors primarily to Dublin, 'Family and Clan' events represented 30% of the total, and community events accounted for an additional 26% (Fáilte Ireland, 2013, p.4; Fáilte Ireland and Fitzpatrick Associates, 2014 p.28). A key contributor to this success was the role played by the local population in issuing invitations to friends and family living overseas. A Behaviour and Attitudes survey indicated that 1 in 3 adults reported that they had personally invited someone to visit Ireland during 2013 (Fáilte Ireland, 2013, p.4 & 20).

The Gathering contributed to an above average growth rate for Irish tourism, and in particular to the improved spatial spread of overseas visits – a welcome source of revenue to host communities (Fáilte Ireland, 2013, p.17-21; Fáilte Ireland and Fitzpatrick Associates, 2014 p.i). As noted throughout the literature, tourism can be a major source of fresh revenue to a region, and many destinations, "look to tourism… for economic salvation" (Cole, 2015, p. 1311). Although the campaign fell short of its target of attracting an additional 325,000 visitors, it is likely that it met or exceeded the revenue target of €168m, with the Economic Impact Study reporting visitor expenditure levels of €160-200m. Gathering visitors, a large proportion of whom originated in the United States, spent more on average than other overseas tourists (Fáilte Ireland and Fitzpatrick Associates, 2014 p. 13).

The Gathering was a campaign targeted, in part, at the VFR market segment. Backer and King (2015) argue that this group was previously neglected due to the perception that for such travellers the decision to travel to a particular destination has little potential to be swayed either way by marketing. Additionally it was assumed that VFR travellers contribute little to the host economy through their reduced need for commercial accommodation. Research on hotel guests has found that a rate of between 8-10% are classified as VFR travellers, and in excess of 20% of VFR travellers report purchasing hotel rooms (MacEachern 2016; Braunlich and Nadkarni, 1995). Backer and Morrison (2015) argue that although VFR travellers tend to spend less on average per day due to their lower custom of commercial accommodation and package tours, once these categories are excluded VFR travellers often spend more on activities, shopping and meals, and the duration of their stay tends to be longer than that of pleasure tourists. Therefore, the economic contribution of VFR travellers is often significant and this market segment should not be neglected. Backer and King (2015) included a case study of 'The Gathering' in their book on VFR Travel Research, highlighting it as an example of a successful VFR campaign, and the higher levels of spending by Gathering visitors (even without excluding accommodation) supports this (Fáilte Ireland and Fitzpatrick Associates, 2014 p.13).

The VFR nature of the Gathering, the centrality of 'invitations' to the campaign, and the events themselves helped to alleviate some of the difficulties typically faced by destination marketing campaign evaluators. Irish residents were surveyed by Behaviour and Attitudes, which allowed evaluators to determine (among other relevant indicators) what proportion had invited visitors to Ireland in 2013 (Fáilte Ireland, 2013, p.20). Additionally, data was gathered from overseas visitors via surveys conducted onsite at six Gathering events, and attendance figures were gathered via both ticketing data and questionnaires completed by event organisers. This data was combined to estimate the proportion of overseas visitors and locals in attendance at events and to avoid double counting of visitors who may have attended more than one Gathering event (Fáilte Ireland and Fitzpatrick Associates, 2014a pp.1-5). The events focus of the Gathering ensured that overseas visitors influenced by the campaign were accessible to surveyors, assisting in the evaluation of the campaign.

Other destination marketing campaigns are not so easily evaluated for a range of reasons discussed by Pike and Page (2014) among others. Barriers to evaluation include the difficulty in extracting the impact of influences other than those controlled by a DMO on visitors' impressions of the destination (books, films, geography lessons etc.), the potentially long delay between the beginning of a campaign and a change in visitors' perception of a destination, the lack of relevant and reliable data providing definitive causal evidence between campaigns and behaviour, and the lack of data regarding the true motivations of overseas visitors. An example of a data gap is Hughes's (2002, p. 158) discussion of the difficulties faced in evaluating the impact of Manchester's gay tourism advertising campaign: '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' (Hughes, 2002 in Pike and Page, 2014, p.31). Similar barriers to effective evaluation may have been encountered by other campaigns aimed at promoting LGBT tourism, such as the "Ireland says 'I Do'" campaign which aimed to encourage LGBT couples to marry in Ireland, following the introduction of marriage equality in 2015. It would likely have been difficult to extract the effect of this Tourism Ireland campaign from the more general impact of extensive international coverage of the referendum and social media activity, including the popular '#HometoVote' which trended on Twitter, among other social media sites.

1.3 'Put Local People First' – Considering the Residents of Tourist Destinations

In their analysis of VFR Travel Research, Baker and King (2015) highlight the importance of resident buy-in to the success of DMO campaigns. Local residents as 'the gatekeepers of the product' (ibid) are central in the context of VFR travel; however the need for destinations popular with tourists to prioritise the welfare of local populations is evident throughout the broader destination marketing literature. Toposophy (2016), a destination marketing agency, published a discussion paper advising DMOs on navigating the opportunities and challenges arising from the growth of the 'sharing economy' in tourism. This paper focused on how this growing marketplace both enables greater interaction between residents and visitors – often to the benefit of both – and contributes to conflicts between these stakeholders. While online platforms, such as Airbnb often provide local residents with a source of revenue, they have also been implicated in contributing to increasing rents and a contraction in the supply of long term rental accommodation (ibid, p.14). The increase in short term letting has in some cities, increased the supply of accommodation for visitors at the expense of local residents, who face housing shortages and increased living costs (Martins, 2018, p.4). DMOs who fail to consider the needs of local residents may discover that they not only struggle to encourage locals to welcome visitors, but tourists may in fact face open hostility (Martins, 2018; Brida and Zapata-Aguirre, 2009 p. 216; Zerva et al, 2017).

'Tourism-phobia' is a term which has been coined to describe the growing negative perception of tourism in popular destinations (Martins, 2018, p.3). The European Tourism Association (ETOA), a professional organisation representing tour operators and suppliers issued a press release in response to recent antagonism in Barcelona, where hostile graffiti with messages such as: 'Tourist: Your Luxury Trip, My Daily Misery', or 'Tourists go home, refugees welcome', is increasingly prevalent (López Díaz, 2018; Guardian, 2018). The ETOA acknowledged 'the loss of available rental property for residents' following the 'growth of the peer-to-peer accommodation sector and the sheer volume of day visitors' in Barcelona. They called on policy makers and industry to respond to ensure a long term strategic approach, centred on consultation and creative solutions that will satisfy residents and avoid hostility toward visitors, who are a valuable source of employment to the city. The ETOA acknowledge, however, that: 'Barcelona has rightly identified the challenge as managing a tourism city as distinct from managing tourism in a city' (ETOA, 2017).

I amsterdam, the DMO for the Dutch city of Amsterdam, has responded to the challenges of what has been termed 'overtourism' (Goodwin, 2017 p.1, Milano, 2017) with a 'residents first' strategy (Pieters, 2017). Frans van der Avert, CEO of Amsterdam marketing has been outspoken about the downsides of mass tourism. Speaking at the World Tourism Forum in Lucerne, he stated that "We don't spend even €1 in marketing Amsterdam any more. We don't want to have more people. We want to increase the quality of visitors" (López Díaz, 2017). His profile on the I amsterdam website describes his approach as: 'integrated…with a clear focus on the three most important stakeholders: local residents, companies and visitors' (I amsterdam, 2018).

The concepts of 'tourism-phobia' and 'overtourism', popularised by Harold Goodwin, retired Professor of Responsible Tourism at Manchester Metropolitan University and current Director of the Responsible Tourism Partnership, are increasingly prevalent in both tourism literature and the political realm. The Tourism Planning and Development Journal has issued a call for papers on 'Overtourism and Tourismphobia: A journey through four decades' of tourism development, planning and local concerns' to be published in 2019 (Milano et al., 2017). Additionally, The World Tourism Organization (UNWTO) has published a guide for DMOs and other actors titled 'Overtourism? Understanding and Managing Urban Tourism Growth beyond Perceptions' (UNWTO, 2018). The European Parliament has also demonstrated interest in this topic through the commissioning of a study on the "Impact of over-tourism and possible policy responses" (Research4Committees, 2018). A team of researchers from Breda University of Applied Sciences' Centre for Sustainability, Tourism and Transport, Stenden University of Applied Sciences, University of Brighton, the Ostelea School of Tourism and Hospitality, and Lund University, are currently working on this study (IPM, 2018). These capacity challenges are likely to increase with a growth in demand from long-haul emerging markets visiting Europe projected, with increased demand likely to compound challenges mature European and North American markets (Toposophy, 2018 p.16).

1.4 Sustainable Tourism and Managed Destinations

Concerns regarding 'overtourism' are not confined to Europe. The potential negative consequences of some tourism on the lives of residents and for the environment has led to extensive discussion within the literature and to many DMOs pursuing policies of 'sustainable tourism' which seek to curb these ill effects (Edgell 2016; Ritchie and Crouch, 2003; Bramwell and Lane, 1993; Place et al, 1998; Rhanaen eta al, 2015; Weaver and Jin, 2016). 'Sustainable Tourism' has been defined by the UN as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO, 2015 pp.11-12). The concept of 'Sustainable Development', which includes Sustainable Tourism was defined and popularised through the publication of the 1987 Brutland Report ('Our Common Future'), by the Brutland Commission, established two years prior by the United Nations to promote a multi-national response to sustainable development (Ruhanen el al, 2015). Ruhanen et al (2015), argue that in the 25 years since the publication of this report 'sustainable tourism has emerged as the dominant paradigm in tourism development' (ibid. p.517).

Sustainable Tourism strategies often include components similar to the 'quality over quantity' approach pursued by I amsterdam. Bhutan, a country famed for the pursuit of 'Gross National Happiness' rather than Gross Domestic Product (GDP), was awarded the 2018 World's Most Sustainable Destinations' Earth Award (Tourism Council of Bhutan, 2018). This award is granted by 'Green Destinations', an international NGO dedicated to the promotion of sustainable tourism (Green Destinations, 2018), which each year compiles a list of 100 DMO managed destinations that meet their '30 core criteria for the Green Destination standard' (Green Destinations et al, 2018). With this award, Green Destinations recognised Bhutan's commitment to a strategy of 'responsible tourism' managed in line with their pursuit of Gross National Happiness, with particular emphasis on their commitment to environmental sustainability. Bhutan's sustainable tourism approach includes a $200-

$250 minimum daily fee for most overseas visitors, which includes a $65 'Sustainable Development Fee' (Green Destinations, 2018a; Tourism Council of Bhutan, 2018).

The pursuit of Sustainable Tourism poses many of the same challenges for DMOs as other strategic goals. DMOs are charged with attracting visitors to a destination, in part through advertising a distinct destination image and brand. The resulting 'brand promise' is for an experience that the typical DMO has neither the resources nor power to deliver. The DMO relies on the buy-in of a wide range of stakeholders, often via partnerships, to ensure that this brand promise is realised (Pike and Page, 2015 pp. 10-11). In recognition of these limitations on the role of the DMO, Pike and Page (2015) emphasise that DMO should be understood to reference 'Destination Marketing Organisation' as opposed to 'Destination Management Organisation' due to the real world limitations on the DMO's mandate or capacity to fully 'manage' the destination that they seek to promote (ibid, pp.6). Pike and Page (2015) reference the prediction of Plog (2000) that demand for consistency of quality and capacity would drive a growth in demand for managed destinations such as resorts and cruise ships (ibid, pp.9). Toposophy (2016) point to the growth in online reviews and an increase in peer level influence among the so called 'millennial generation', arguing that these peer-to-peer reviews and social media posts increase the need for destinations to live up to the promise of their branding. Toposophy (2015) demonstrate more optimism regarding the potential for the DMO to manage the experience of their visitors through an 'experience design' that facilitates 'the creation of 'touch points'; moments where the visitor will interact in a meaningful and fulfilling way with the destination and its people' (ibid, pp.17).

The increase in demand for 'managed destinations' projected by Plog (2000) (Pike and Page, 2015 pp.9), has indeed materialised with the FCCA (2016) reporting a 62% increase in demand for cruises between 2005 and 2015. 'In 2016 24.2 million passengers cruised globally' (ibid, pp.3). However, although on board the ship may be a managed space, cruises still dock at more traditional destinations. The docking of a cruise ship and the disembarkment of many thousands of travellers can cause a strain on local resources. There may be adverse environmental consequences and significant stress for the local population (Weaver and Lawton, 2017; Gabriel Brida and Zapata-Aguirre 2017). One study of residents of Falmouth, a Jamaican cruise port town, found that 78% (n=362) reported increased stress levels as a result of the new cruise port. A thematic analysis revealed the causes of this stress included; 'crowding/congestion, increased cost of living, police harassment, displacement, and overused utilities' (Jordan and Vogt, 2017). There has been significant research on the costs and benefits of cruises for local economies and the behaviour of cruise passengers at off-boat destinations, particularly in the Caribbean (Sun et al, 2018; De Cantis et al, 2015; Gabriel Brida and Zapata-Aguirre 2017). One finding has been the detrimental impact of all-inclusive (AI) holiday packages for these and Mediterranean destinations, with AI tourists frequently making little contribution to the local economies that they visit (Farmaki, 2017). Some destinations have responded to these pressures by capping the number of cruise passengers allowed to disembark per day. In 2016, Santorini capped the number of cruise passengers at 8,000 per day in response to crowds in excess of 10,000 during the high season (Jet, 2018).

1.5 Conclusion

Destination marketing is a core tourism activity, primarily managed by publicly funded DMOs at either a local, regional or national level. The necessary constraints of funding and control over the actual product/service delivered means that their principal role is of developing a branding strategy for their destination and then partnering with other stakeholders to ensure the delivery of this brand promise. Their ability to work well with other stakeholders is a core competency in ensuring sufficient ‘buy in’ to their strategic image for the destination. It is through effective working with businesses and the wider host population that the most effective DMO campaigns are delivered.

Key challenges facing DMOs centre on the potential for a clash in the welfare of the local population and visitors. The ill-effects of what has been termed ‘overtourism’ include environmental degradation and a strain on local resources and the local people of a destination. Responses have included a growth in scholarship and strategies concerned with the development of sustainable tourism and a ‘local people first’ ethos, as exemplified in Amsterdam and Bhutan. Both challenges and opportunities form the growing demand from emergent long haul markets, and the growing cruise industry. Effectively marketing their destinations, while managing stakeholder relationships, in the context of these changes is a challenge faced by DMOs going into the future.

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