



# Destination Marketing Strategies: Selected Case Studies, Main Challenges, Recommendations and Prospects

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# Agenda

**Case studies** (Canada, Turkey and the UK)

Lessons to be learned from the case studies

**Destination images of three OIC member states** (Lebanon, Mozambique and Turkey)

**Field Visits**

**Findings from quantitative and qualitative studies**

**Main challenges**

**Policy recommendation**

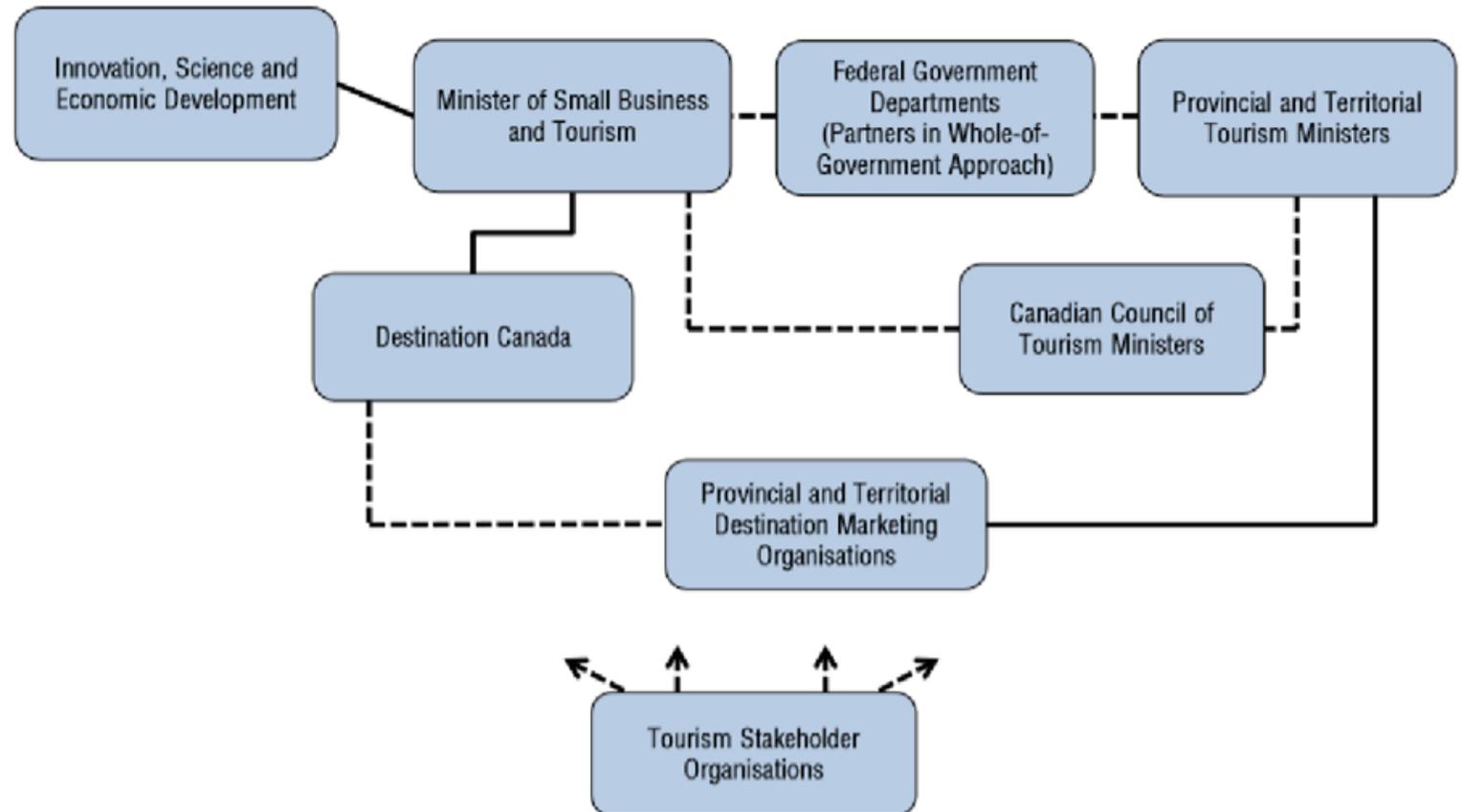
# CASE STUDIES- Canada



Destination Canada has three key operational objectives:

- Objective 1: Increase demand for Canada with innovative marketing.
- Objective 2: Advance the commercial competitiveness of the tourism sector.
- Objective 3: Increase corporate efficiency and effectiveness

Canada: Organisational chart of tourism bodies



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

# CASE STUDIES- Canada

## Key Lessons

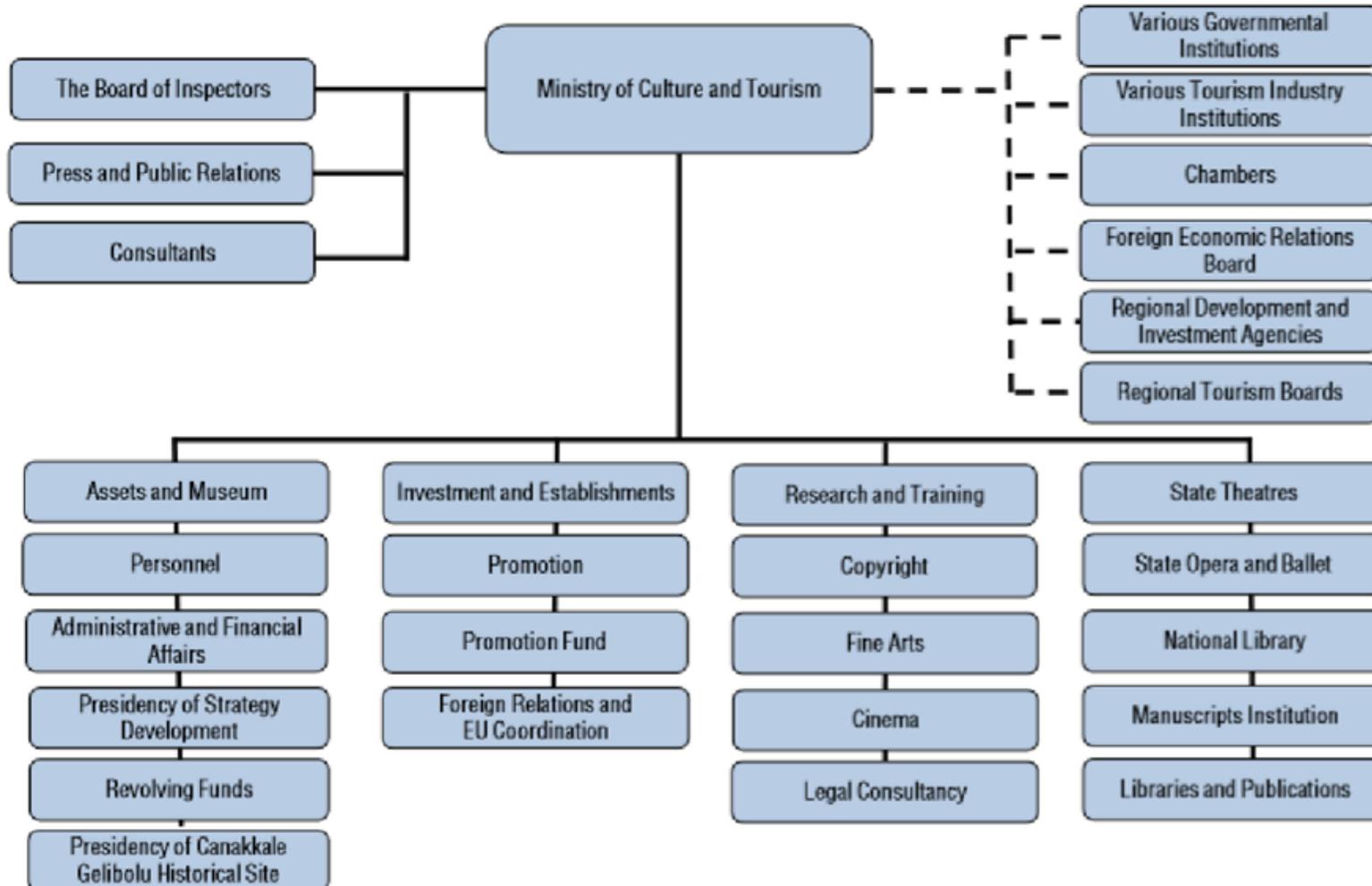


- A long-term time horizon for marketing strategies
- It must be recognised that tourism is not simply the preserve of central governments
- Strong dialogue between government, industry, and civil society.
- Marketing depends upon the creation of added value
- The growth of international travel
- There is a need to maintain diverse source markets
- Continuity and long-term commitment to funding tourism budgets delivers confidence
- The preparation and launch of new policies and strategies can serve to galvanise the sector
- Policy demands that cultural and national heritage assets are conserved in their own right
- Data should drive marketing decisions
- Evaluation of marketing and promotion activity is important to gauge return on investment
- Innovative and contemporary marketing approaches by tourism agencies ensure leadership in the sector
- Policy and programme support for them in marketing functions creates a competitive and sustainable destination

# CASE STUDIES- Turkey



Turkey: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture and Tourism, 2018.

Turkey's Tourism Marketing Strategy has identified the following as keys to success:

- Advertising
- Partnerships
- Sponsorship
- Community involvement
- Culture and national heritage
- Event promotion
- Trade shows
- Digital marketing
- Online booking/payment
- Social media
- Off-season promotion
- Promotional documentaries

# CASE STUDIES- Turkey

## Key Lessons

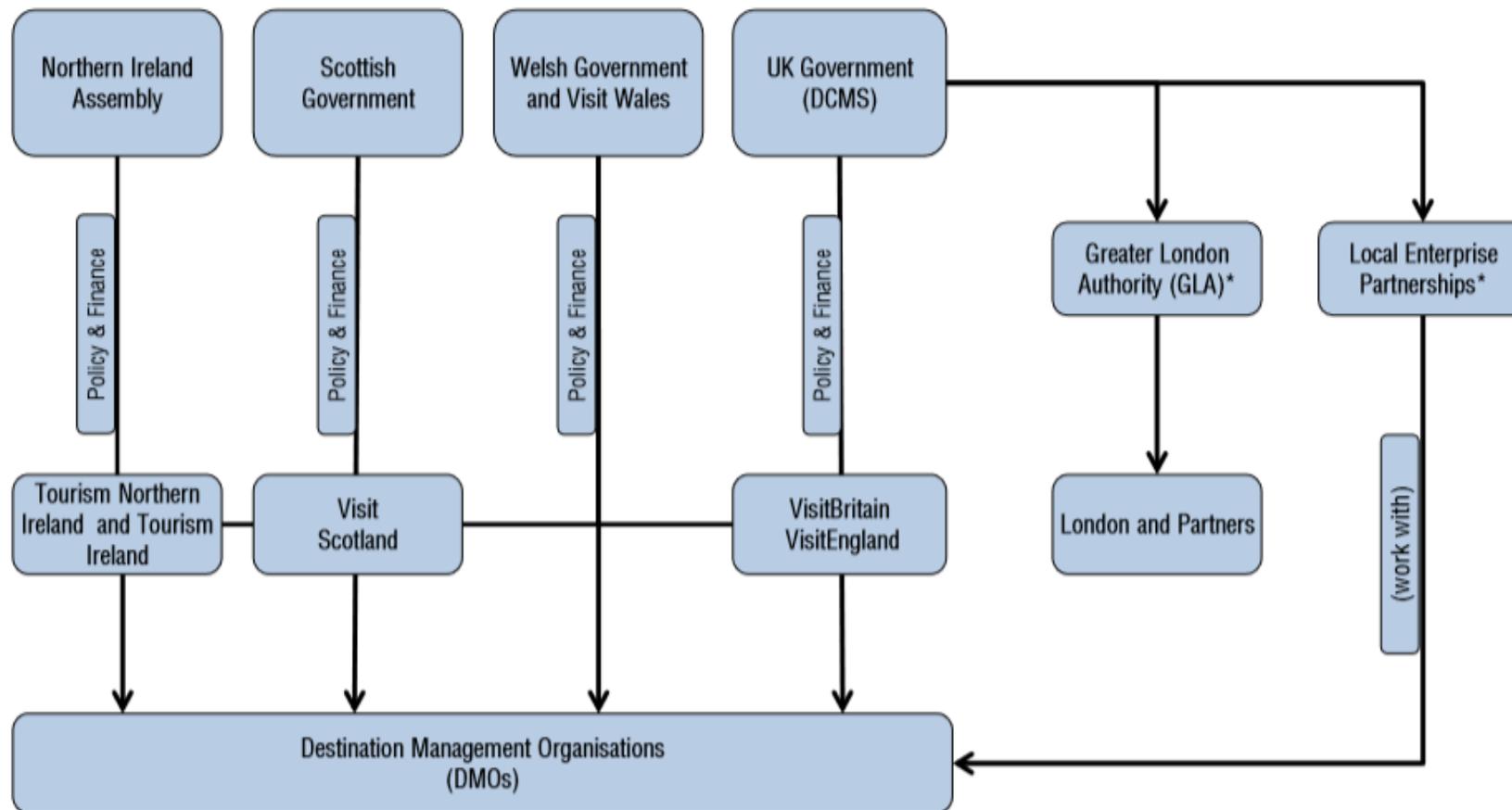


- Recognition of the importance of a 'whole of government' approach to tourism
- Recognition that tourism governance should be transparent, flexible and accountable.
- The involvement of all stakeholders in the consideration of tourism marketing and promotion in Turkey
- The imperative of taking a long-term time scale for strategies and policies
- The importance of an integrated regional development approach
- Recognition of the imperative to diversify away from mass tourism
- The importance of recognizing local destinations as the place where tourism occurs
- The importance of digital media
- The need to strengthen promotion and development of the domestic market
- Recognition of the need to conserve and interpret cultural and natural heritage
- Recognition of the need to maintain diverse source markets
- Development and protection of the country's image
- Resolve to set aside 1% of tourism revenues for marketing and promotion

# CASE STUDIES- UK



United Kingdom: Organisational chart of tourism bodies



\* Separate funding relationships apply.

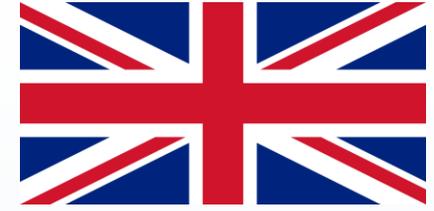
Source: OECD, adapted from the Department for Culture, Media and Sport (DCMS), 2018.

The Tourism Action Plan, outlines the UK government's five tourism priorities:

1. Strengthening coordination and collaboration;
2. Boost apprenticeships and attract more people to careers in tourism;
3. Examine the scope for deregulation;
4. Make it easier for visitors to explore by rail, bus and coach
5. Driving continuous improvements in the UK visa service.

# CASE STUDIES- UK

## Key Lessons



- ▶ Tourism policy and structures for marketing are disjointed and fragmented
- ▶ Fragmentation and continual re-organisation has also meant that the long-term view has been difficult to achieve
- ▶ The UK has recognized that tourism is not simply the preserve of central governments
- ▶ Recognition of the value of strong dialogue between government and industry is clear but implementation has been patchy due to the lack of priority given to tourism by government
- ▶ Tourism policies and agencies do give priority to opportunities presented by digitalisation
- ▶ The growth of international travel
- ▶ There are attempts to improve transport connectivity and reduce barriers to travel
- ▶ In the UK the regional organisation of tourism is confused and not consistent
- ▶ Budgets have suffered at the hands of the Government's public spending austerity policy.
- ▶ Any public spending is closely scrutinized for effectiveness
- ▶ Events are highly valued attractions as key drivers of demand

## **Lessons from three case studies** (Canada, Turkey & the UK)

- 1. A coherent and integrated structure from Government down provides consistency**
- 2. Adequate budget for advertising and promotion.**
- 3. Partnerships enable the wider distribution of the marketing messages.**
- 4. Community involvement underpins and reinforces the marketing message.**
- 5. Digitization is critical.**

# Destination images of three OIC member states (Lebanon, Mozambique and Turkey)



Middle east and Arab  
world tourism



Evidence from Africa  
and early stage of  
destination development



Leading OIC country in  
tourism

# Destination images of three OIC member states (Lebanon, Mozambique and Turkey)

**Field Visits**

**Mixed Method Approach**  
(survey & interview)

**Quantitative phase** (Destination image of the visitors and their desired behavioural intentions: satisfaction and loyalty)

**Qualitative phase** (Tourism activities from public and private sectors)

# Destination images of three OIC member states

## Overall Statistical Results

### Reliability

Alpha coefficients were greater than 0.7 indicating the reliability of the measure:

- Favourability responses - 0.957
- Natural/cultural resources - 0.834
- Tourism development - 0.847
- General infrastructure - 0.805
- Social setting/environment - 0.865

### Validity

The scale composition of the items was also checked using the EFA. Four dimensions emerged from the 19 attributes of the destination image and the factor loading for all items was above the recommended level of 0.5.

# Destination images of three OIC member states

## Different visitors' responses to destinations

- Lebanon and Mozambique are significantly different in terms of favourability responses from the visitors' point of view (Mean Difference = -0.86,  $p < 0.001$ )
- Lebanon has no significant difference with Turkey regarding favourability responses by visitors (Mean Difference = -0.36, non-significant:  $p > 0.05$ )
- Visitors expressed significantly different responses towards Mozambique compared with Turkey (Mean Difference = 0.50,  $p < 0.01$ )

Table 10 - Results of means comparison analysis (ANOVA)

Favourability Responses	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	36.00	2	18.00	9.15	0.0001
Within Groups	692.36	352	1.97		
Total	728.36	354			

Tukey HSD	Country	Mean Difference	Std. Error	Sig.	Status
Lebanon	Mozambique	-0.86*	0.21	0.00	Different
	Turkey	-0.36	0.20	0.19	No difference
Mozambique	Lebanon	0.86*	0.21	0.00	Different
	Turkey	0.50*	0.17	0.01	Different
Turkey	Lebanon	0.36	0.20	0.19	No difference
	Mozambique	-0.50*	0.17	0.01	Different

Note: \*: The mean difference is significant at the 0.05 level.

## Destination images of three OIC member states

### Relationship between destination image and visitors responses

Table 9 - Results of correlation analysis

Factors	Natural/cultural resources	Tourism development	General infrastructures	Social setting/environment	Favourability responses
Natural/cultural resources	1				
Tourism development	.801**	1			
General infrastructures	.694**	.799**	1		
Social setting/environment	.836**	.764**	.729**	1	
Favourability responses	.623**	.655**	.579**	.655**	1

\*\* . Correlation is significant at the 0.01 level (2-tailed).

Results showed that relationships between favourability responses, and the four attributes of destination images, in all three destinations, were significant and positive.

# Destination images of three OIC member states

## Effects of destination image on visitors responses

Table 11 - Results of regression analysis

Effect of destination image attributes on visitor responses	Lebanon		Mozambique		Turkey	
	$\beta$	sig	$\beta$	sig	$\beta$	sig
Natural/cultural resources → Favourability responses	-0.05	0.54	<b>0.24</b>	0.00	0.11	0.33
Tourism development → Favourability responses	<b>0.50</b>	0.00	0.13	0.09	<b>0.40</b>	0.00
General infrastructures → Favourability responses	<b>0.30</b>	0.00	<b>0.16</b>	0.05	0.07	0.56
Social setting/environment → Favourability responses	<b>0.18</b>	0.05	<b>0.22</b>	0.00	<b>0.23</b>	0.04

*Note:* bold values indicate significant path.

# Qualitative Findings

Recent performance indicates the tourism industry in Turkey is improving and on target to achieve its strategic goals. With a more mature tourism industry, it is more robust and able to recover more quickly from downturns compared to e.g. Lebanon, which has a less developed tourism industry compared to Turkey. In contrast, Mozambique potentially offers similar attractions (sun, beaches, cultural heritage, etc.) to Turkey, but its development in the destination life cycle is at a very much earlier stage and therefore would benefit from the adoption of best practice as outlined in this report.

# Qualitative Findings

## *Key objectives within the strategy/master plan*

### **Turkey**

The main objective of Turkey's Tourism Strategy 2023 is submission of tourism to the leading industry position in regional development and enhancement of employment by the adopting a sustainable tourism approach.

### **Lebanon**

There appears to be 'no real master plan' with well-developed strategies and tactics to implement them.

### **Mozambique**

The key objective of the country's tourism strategy is to increase the number of international visitors in the country. This requires developing the infrastructure through investment. Educating and training people of the country for 'tourism' and commercializing tourism.

Developing the tourism industry by exploiting the country's natural beauty such as sun and sea but also developing tourism through targeting business travellers appear to be key.

# Qualitative Findings

## *Key objectives for marketing and promotion*

### **Turkey**

Advertising campaigns, branding and importance of image come to the forefront on Turkey's promotion and marketing activities.

### **Lebanon**

The key objective of the promotion and marketing is to create an image of a stable and secure destination. This appears to be a challenge as the international visitors' perceptions of Lebanon are influenced by regional political instability.

### **Mozambique**

The main objective of the marketing campaigns is to increase the number of international visitors to the country. There is no proper market research. In fact, informants stated that they would not trust and rely on the statistics regarding the number of visitors visiting the country.

# Qualitative Findings

## *Roles of the Private and Public sectors*

### **Turkey**

In the development of tourism marketing and the tourism sector, public sector organisations and private sector companies are not equal. The development and implementation of tourism policies are carried out by the Ministry of Culture and Tourism. For this reason, the public sector is at the forefront. Private sector companies comply with the policies and practices that the ministry has implemented.

### **Lebanon**

There is no real private-public sector partnership.

### **Mozambique**

There is very limited communication and coordination between private and public sectors. They would benefit from learning from each other and work for the development of more innovative approaches to promotion, marketing and tourism development.

Informants share the opinion that the private sector cannot drive tourism without the government. It should be a high priority to the government as this would make a significant difference, but there is a long way to go.

# Qualitative Findings

## *Prospect of destinations*

### **Turkey**

In 2018, 40 million tourists are expected to visit Turkey. If strategies mentioned in Turkey's Tourism Strategy 2023 and targets related to these strategies are correctly followed, it is certain to reach the targeted figures in terms of the number of tourists arriving, total tourism revenue and expenditure per tourist in Turkey.

### **Lebanon**

Development of Tourism in Lebanon depends on political stability in the region.

### **Mozambique**

Better communication and marketing for the country. More things seem to be happening in Mozambique and a few people are starting initiatives but they don't have the back-up, i.e. music events, restaurants. A new fish market has been developed but planning needs to be done to sustain this and encourage visitors.

## Main challenges

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



## Policy recommendations

1. Long-term funding for destination marketing should be guaranteed.
2. A cohesive destination marketing strategic plan is required.
3. Collaboration between government, regional agencies and commercial organisations is critical for effective destination marketing.
4. Ring-fence resources for DMOs.



## Policy recommendations

5. Ensure policy facilitates and encourages innovation in destination marketing and prioritises digitization.
6. Ensure policy creates conditions for micro, small and medium-sized suppliers to be competitive.
7. Ensure that policy recognizes and supports key drivers of demand.



# Thank you for your kind attention

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