

Global Trends in Destination Marketing Strategies: Policies, Strategies and Tools

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OIC/COMCEC
Private Sector Tourism Forum
Istanbul, 16 December 2013

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Seconds

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Average Patience of Tourist Searching Internet

7

Seconds

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Attention Span Internet User



Source | F-shaped patterns for reading web content | Jakob Nielsen, http://www.useit.com/alertbox/reading_pattern.html

Attention Span Internet User

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Say it quick, say it well – the attention span of a modern internet consumer

Media organisations must adapt to cater for a generation of internet consumers who expect 'instant gratification and quick fixes'

Posted by Rob Weatherhead Monday 19 March 2012 07:52 GMT Guardian Professional Jump to comments (0)

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Attention Span Statistics

Score: The Attention Span
Research Date: 4/28/2012

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| Attention Span Statistics | Value |
|--|-------------|
| The average attention span in 2012 | 8 seconds |
| The average attention span in 2000 | 12 seconds |
| The average attention span of a gold fish | 9 seconds |
| Percent of people who forget their own cell phone numbers | 25% |
| Percent of people who forget their own cell phone numbers | 7% |
| Average number of times per hour an office worker checks their email inbox | 30 |
| Average length of email of a single office worker | 1.7 minutes |

Source: Statistic Brain Research | Statistic Brain Research | Statistic Brain Research | Statistic Brain Research | Statistic Brain Research

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The age of multitasking and quick fixes, get your message out quick and streamline your website to grab the attention of the modern internet consumer.

With the rapid adoption of smart phones and tablet computers and the expansion of free Wi-Fi, hotspots, and reliable 3G we live in an always on world. You only have to take a look around you in any public location, be it a coffee shop, supermarket, or on a commuter train to see that people are accessing the web on a constant basis. A 2011 AOP website usage study showed that a UK internet user visited 2,516 web pages across 81 domains and 53 sessions in November 2011. That's a lot of content!

This is great for web based businesses as it means their audience is not only growing with each technological advance, but is also reachable 24/7.

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Attention Span Internet User

CONSUMENT KIJKT SLECHTS ÉÉN TEL NAAR RESULTAAT IN ZOEKMACHINE

De consument kijkt precies 1,1 seconde naar een zoekresultaat van Google, MSN, Ilse, Lycos en Kobala. De boodschap moet in die ene fractie daarom duidelijk zijn, anders is de potentiële klant weg.

Eye-tracking is razend snel een populaire manier geworden om te kijken of een website de aandacht trekt waarop wordt gehoopt. Marktonderzoekers lusten er wel pap van. Het vastleggen van oogbewegingen van de consument geeft een duidelijker inzicht dan diens klikgedrag.

Marktonderzoeksbureau De Vos & Jansen Marktonderzoek deed in samenwerking met search engine mediabureau Checkit onderzoek naar vijf zoekmachines. Zij concludeerden dat 'consumenten op zoek naar een transactie meer resultaten bekijken en meer naar het merk kijken dan consumenten die alleen maar informatie zoeken.' Dat lijkt een nogal voor de hand liggende conclusie. Het zou aardiger zijn geweest om daarna te achterhalen welke groep het meest profitabel is, dus werkelijk koopt: de kooplustigen of de kijkers. Maar over zo'n vervolgvraag van marktonderzoekers lees je nooit.

De deelnemers kregen een lijst met zoekopdrachten. De Vos & Jansen gebruikt een infrarood camerasysteem, de kijker kan daarmee zonder iets op z'n hoofd onbelemmerd kijken, 'zoals hij thuis doet.' De camera registreerde de plek van ogen op de site, waarbij de plek van het oog vijftig keer per seconde wordt gemeten. Speciale software registreert en visualiseert de oogbewegingen.

Kijkresultaten

Een relatief gering aantal respondenten (16) keek naar de gesponsorde resultaten aan de rechterkant, bijna iedereen (47 van de 50) keek naar de gesponsorde resultaten bovenaan. Gemiddeld werden 9,2 resultaten bekeken voor de eerste klik. Daar deden ze, ook weer gemiddeld, 10,4 seconden over. De adverteerder heeft een goeie seconde (1,1 seconde) de tijd om de aandacht trekken; dat is de kijktijd per zoekresultaat. De koopwillige bekijkt méér resultaten dan de informatiezoekers: 9,9

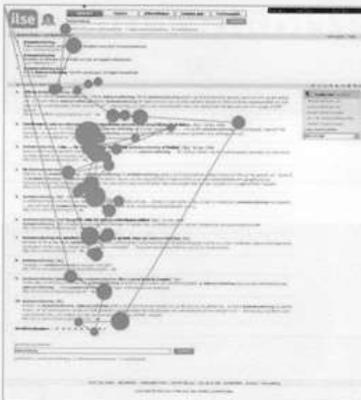
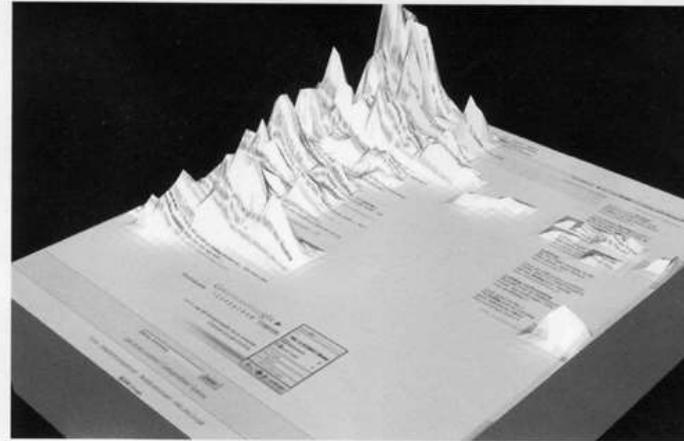
Source | Adforesult, maart 2007

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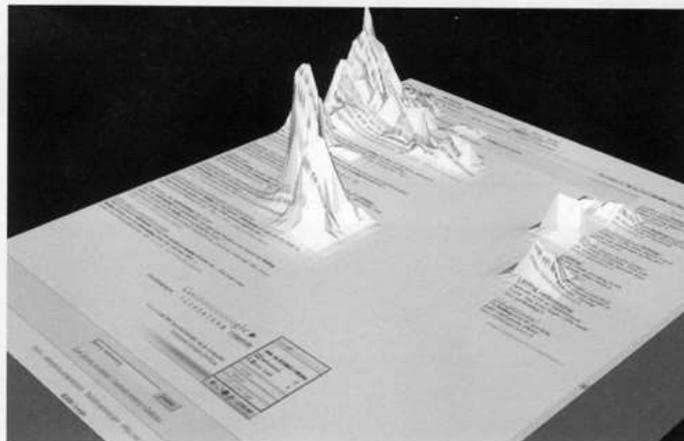
Attention Span Internet User



De met eyetracking onderzochte zoekpagina's van zoekmachines. Linksboven Google, linksonder Ilse. Hoewel, of misschien omdat, alle respondenten googelen, lag de totale kijktijd bij Google lager dan bij andere zoekmachines.



Bergdiagrammen van een persoon met koopintenties (rechtsboven) en van een persoon die informatie zoekt (rechts-onder). De pieken zijn de plekken waar de respondent naar gekeken heeft. Hoe hoger de pieken, hoe langer de persoon heeft gekeken.



Source | Adforesult, maart 2007

What Is It That I Do?

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TEAM offers extensive experience in preparing and implementing tourism strategies and action plans; and in producing realistic, practical business plans for DMOs large and small; from national to local level; from metropolitan cities to rural regions.

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Our Tourism consultants have unrivalled experience in the planning, design and implementation of new tourism structures and the business planning of destination operations, in both the UK and abroad.

e-Business
A common theme in much of TEAM's work is in the application of holistic ICT / e-business solutions across the full range of destination management and marketing activities.

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TEAM offers destination consulting from an experienced team of marketing professionals, available to help DMOs to plan and implement their destination marketing, based on a thorough understanding of tourism markets. We think creatively, but are firmly grounded in the realities of the marketplace.

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TEAM offers the services of many professional researchers, experienced in undertaking, interpreting and disseminating research and in creating and distributing intelligence. We have a thorough understanding of both research techniques on the one hand, and the practical requirements of destination professionals on the other - a key difference between TEAM and most other research providers.

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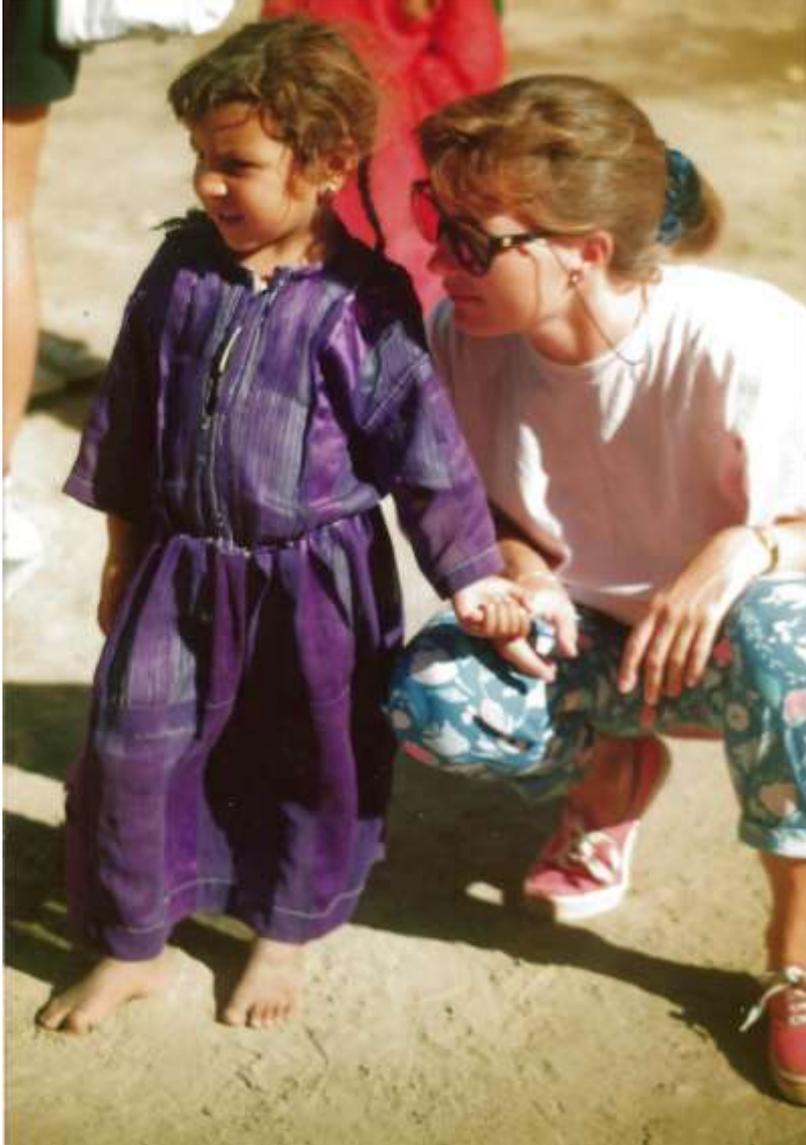
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Mickie Carrigan

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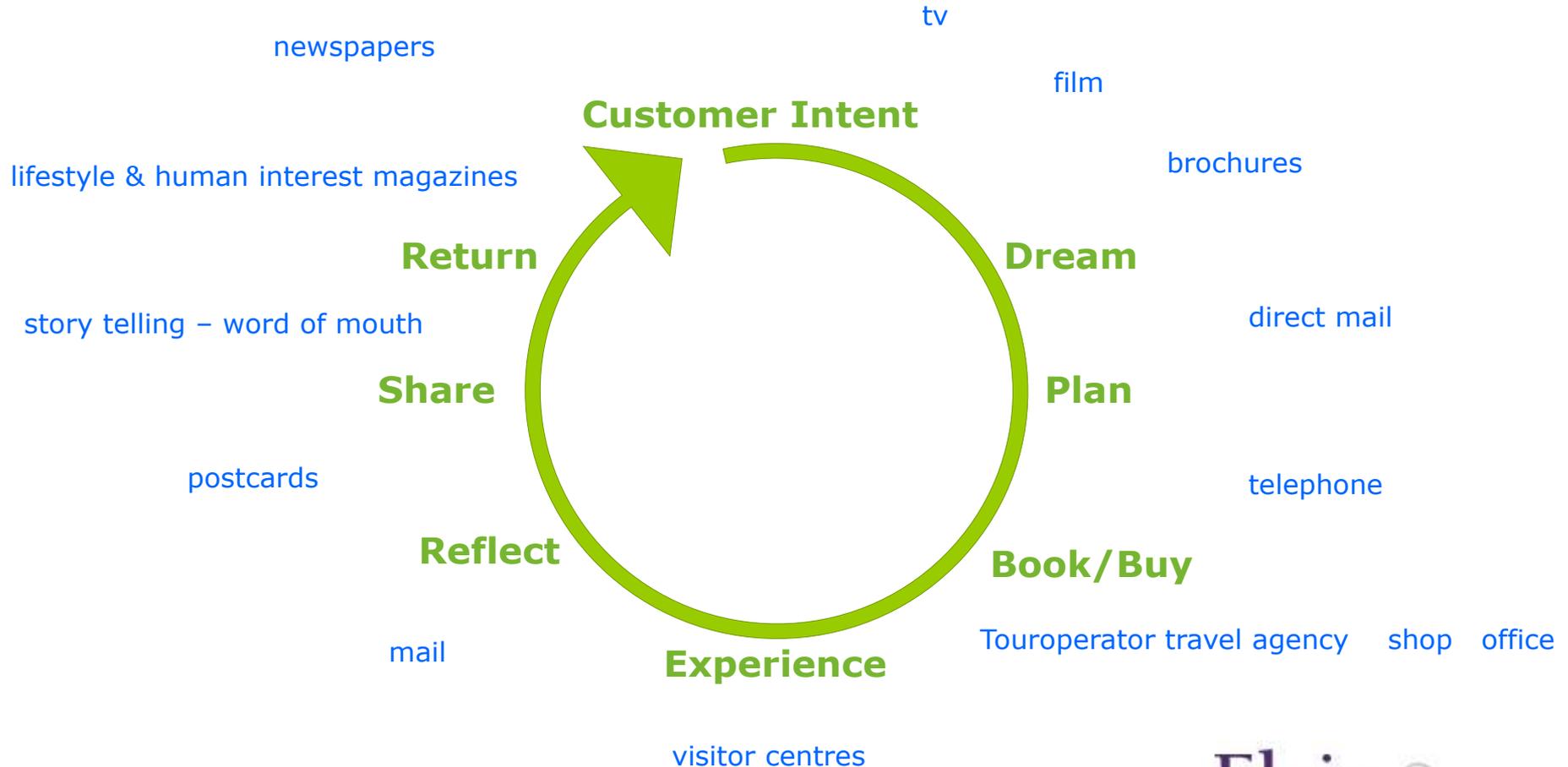


Key Trends in Consumer Behaviour and Technology

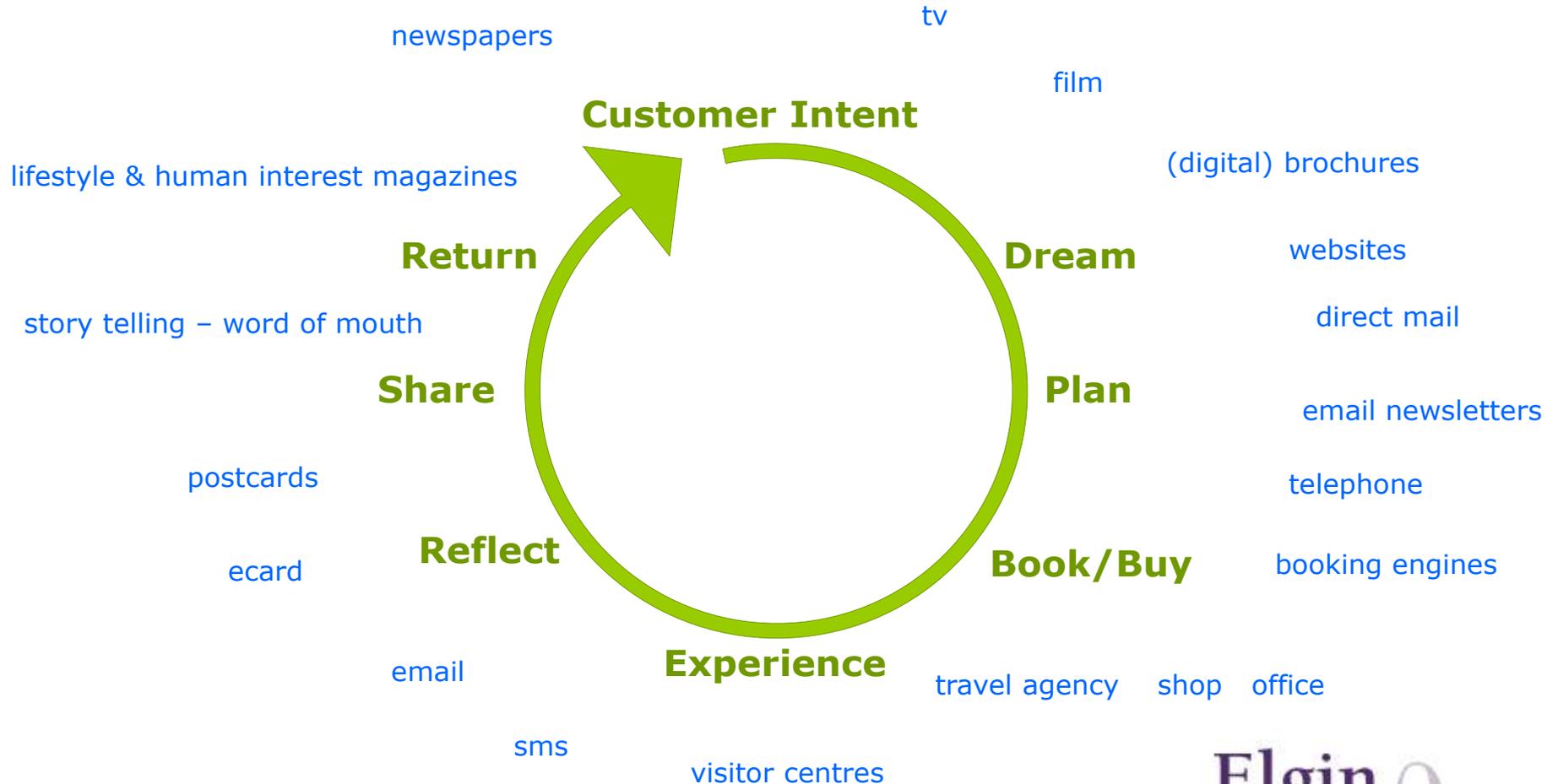


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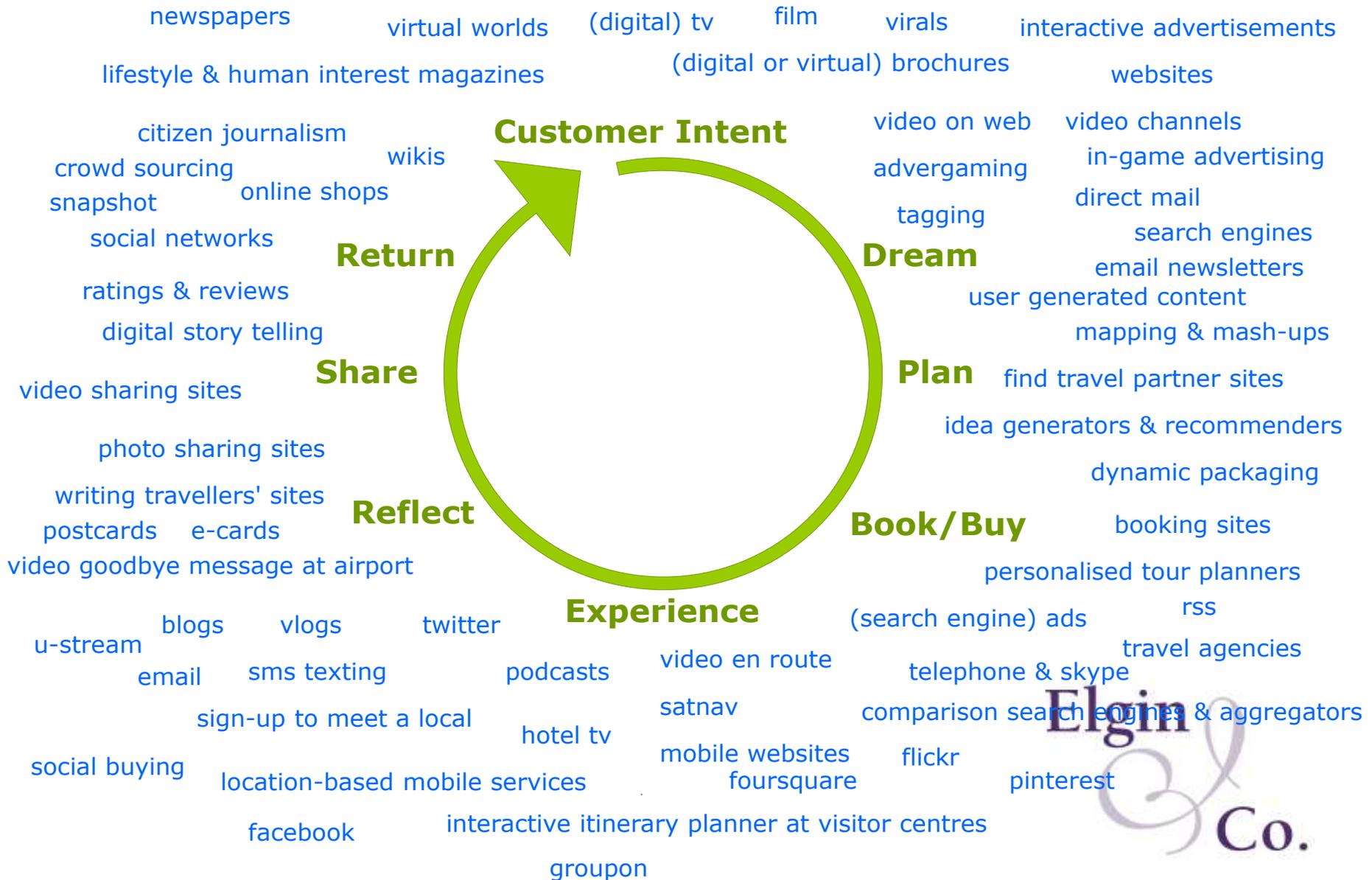
Customer Journey / Customer Experience Cycle



Customer Journey / Customer Experience Cycle



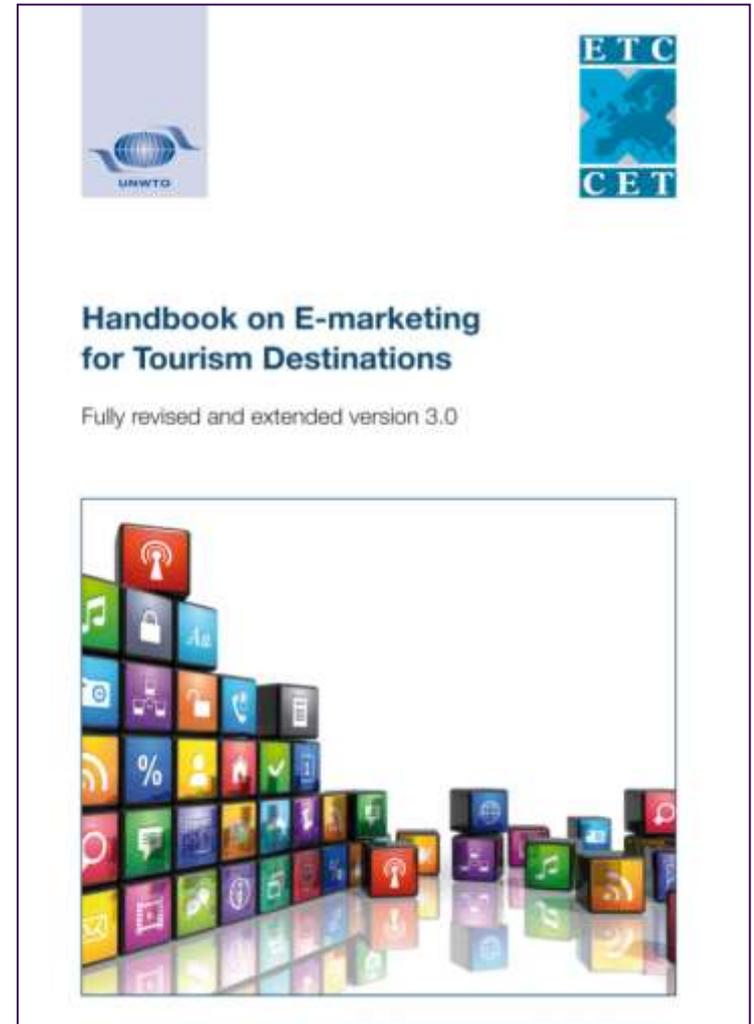
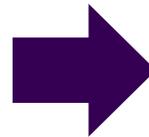
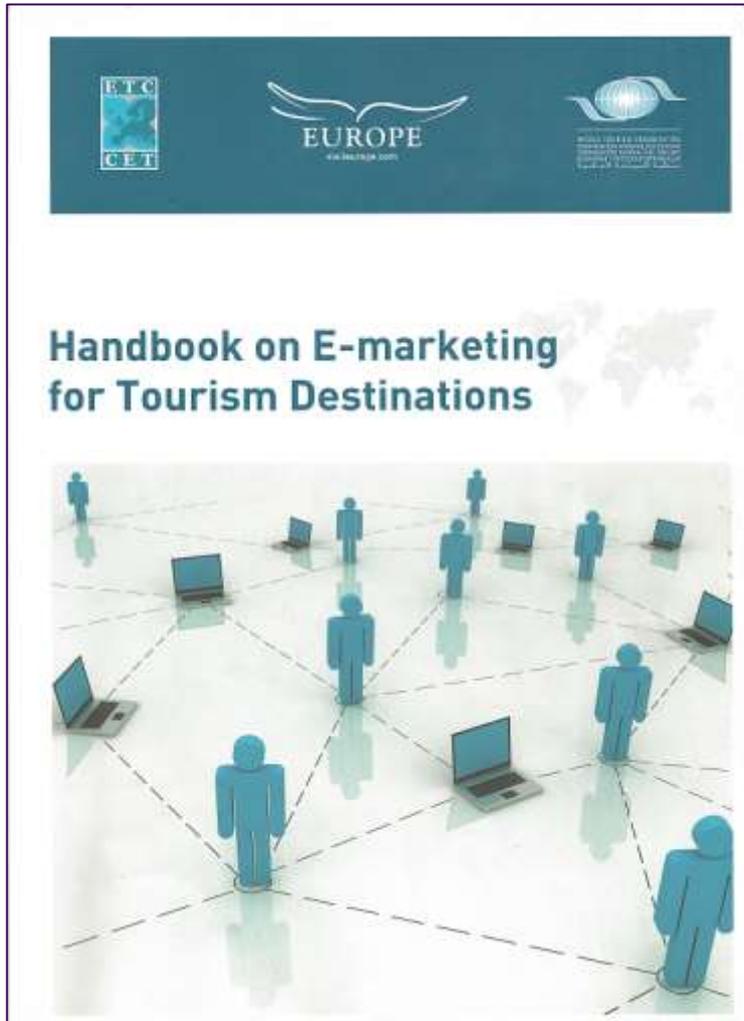
Customer Journey / Customer Experience Cycle



Trends in Technology and Consumer Behaviour >> Critical Success Factors for Branding and Marketing



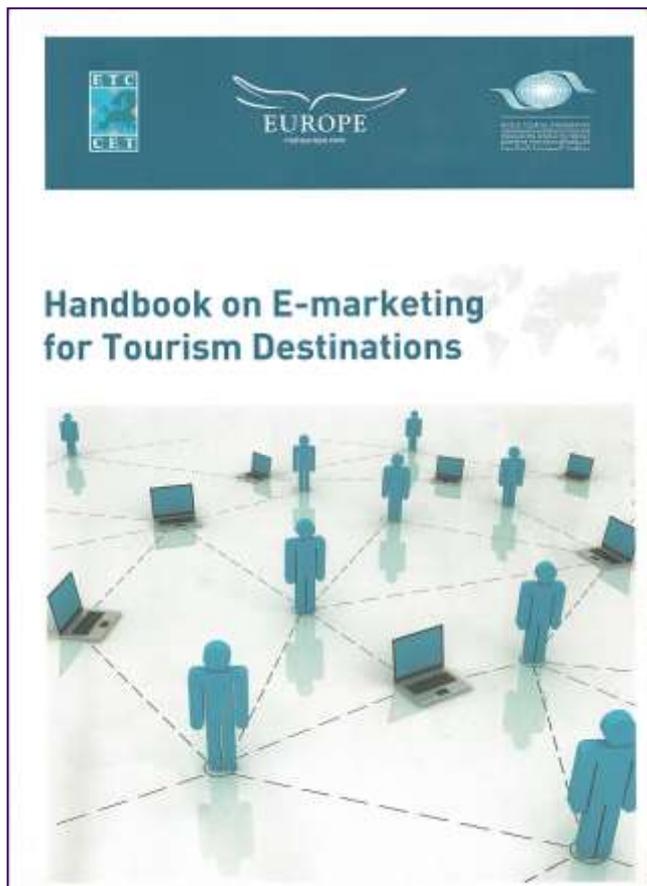
Handbooks on E-marketing 2008 & 2013



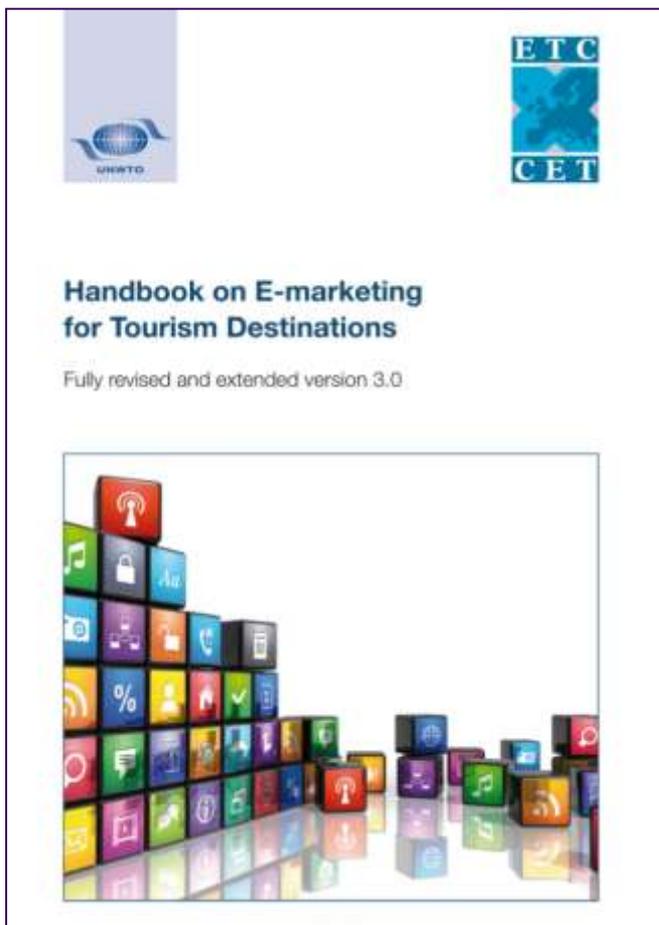
Handbook on E-marketing 2008

Objectives and format:

- Target readers: DMO e-marketing practitioners
- Create **awareness** of the '**e-marketing toolbox**' offering so many exciting new possibilities
- Inspire implementation or improvement
- Increase professionalism and performance
- Practical, user-friendly, comprehensive (all the basics + most leading-edge techniques)
- Link all marketing techniques (research, PR, CRM, etc)
- Expert contributors from around the world, examples, case studies, interviews
- 18 chapters, 280 pages, published as printed textbook and pdf in English, Spanish and Norwegian



Handbook on E-marketing 2013



Objectives and format:

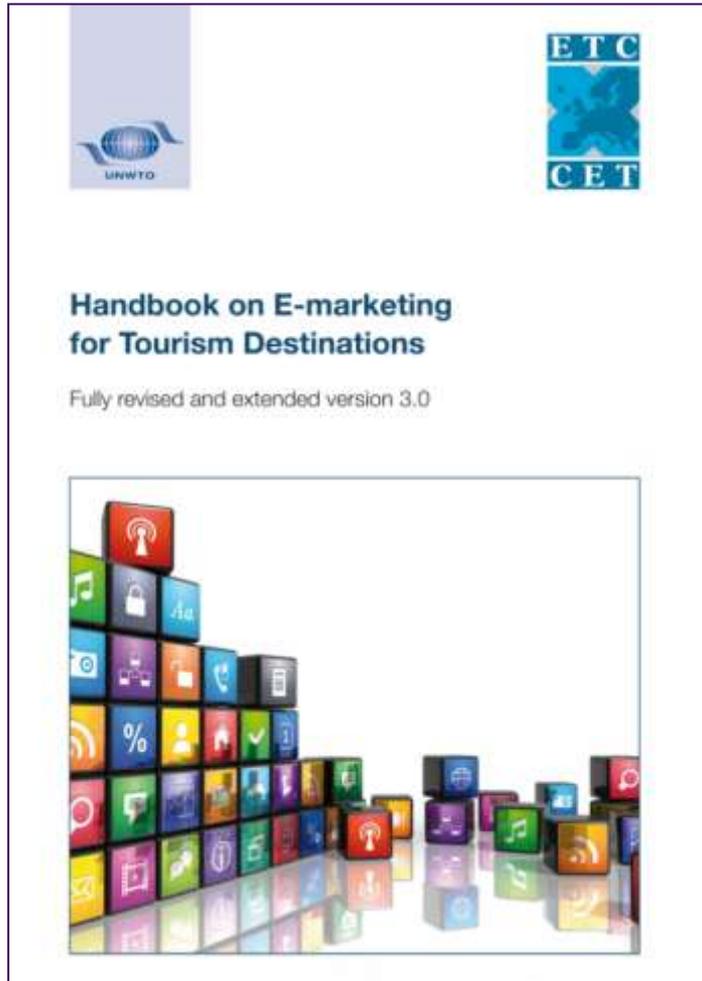
- Target readers: NTO/DMO e-marketing practitioners
- Inspire **optimisation** of e-marketing **skills** with
- More attention given too **developing and integrating** e-marketing **strategy and planning** and tactics
- More attention given to **evaluating and measuring success**
- Practical, user-friendly, appendix with **sources for market research**
- Expert contributors from around the world, examples, case studies, interviews
- **22 chapters, 600 pages**, published as printed textbook and pdf in English and ...

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Handbook on E-marketing 2013

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 3. Destination Brands –
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marketing
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 5. Websites
 6. Domain Names
 7. The Social Web
 8. Search Engine Optimization
 9. E-mail Marketing
 10. Mobile Tourism
 11. B2C E-commerce for Destinations
 12. Paid Media Advertising
 13. Interactive and Smart Television – Increased
Interactivity and convergence of Services
and Media
 14. Customer Relationship Management
 15. E-marketing Activities to Support the
Tourism Suppliers in the Destination
 16. Supporting the Travel Trade in Source Markets
 17. PR and Media Relations
 18. Raising Income from E-marketing Services
 19. Measurement and Evaluation
 20. Web and Social Analytics
 21. Crisis Management and Communications
 22. Legal Framework for E-marketing Activities
- Appendix: Sources for Market Research

Handbook on E-marketing 2013



Sections for different readers:

- Interested in e-marketing trends, strategy and key concepts
- Interested in e-marketing tools
- In collaboration with the travel trade
- Involved in evaluating and measuring the success of e-marketing activities

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Why Be Online?



Why Be Online?



Internet Services

Internet:

An information and communication technology infrastructure [...] which allows people and organisations to offer and buy **services**, which may be used for economic, social, cultural, educational, scientific, and other purposes

Source | Ben Tiggelaar, 1999, Internet Strategie.



Internet Services

- ✓ Information Services
- ✓ Contact Services
- ✓ Transaction Services
- ✓ Entertainment Services
- ✓ Relationship Services

Internet Services

- ✓ **Information Services** offer information to the user. Information: anything that is communicated in any form of language (text, audio, visual).
- ✓ **Contact Services** enable direct contact with the owner of a website and with other users.
- ✓ **Transaction Services** allow organisations and consumers to conduct business online and make agreements.
- ✓ **Entertainment Services** such as competitions and games; contribute to a positive experience of a website
- ✓ **Relationship Services** include email newsletters, social aspects of the web, loyalty programs, etc. and aim to create possibilities for permission marketing and maintain long-term relationships.



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TAIL THIS WAY tail that way TAIL THIS WAY tail that way TAIL THIS WAY tail that way WHAT'S THAT WHAT IS WRONG oh we both know what you did

9 hours ago



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13 hours ago



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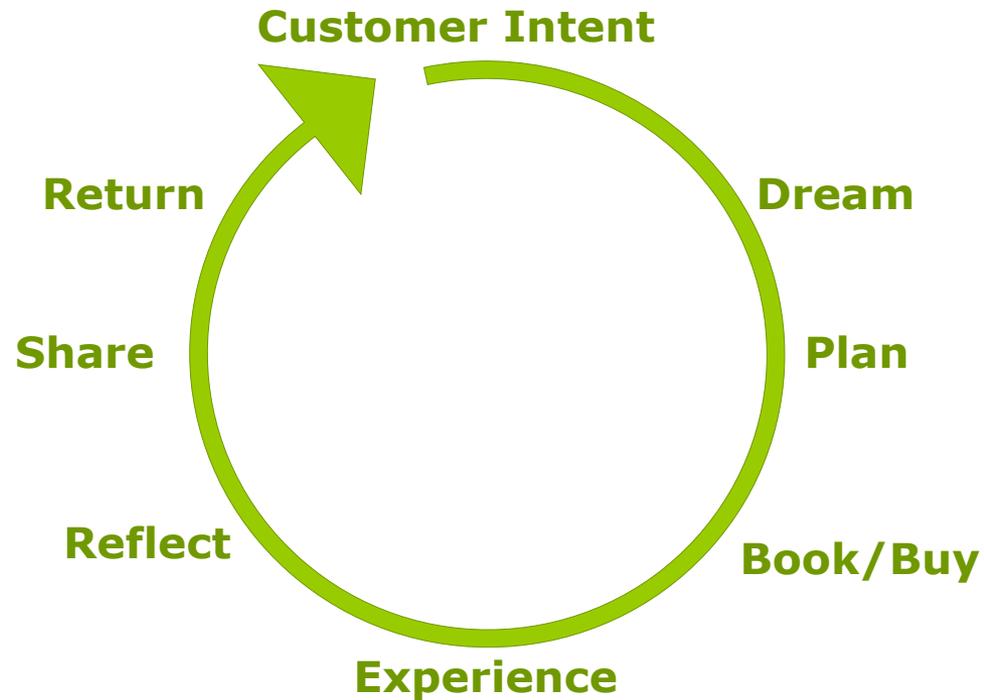
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E-marketing for Tourism Destinations



Ten
Key Trends
in
Technology
and
Consumer
Behaviour

Ten
Key Trends in
E-marketing

Ten
Keys to
Success
in
E-marketing
by
Destinations

Seven
Focal Points
for
DMOs

Ten Key Trends in Technology and Consumer Behaviour



Ten Key Trends in Technology and Consumer Behaviour

- 1. Communication is increasingly mobile** as well as more immediate; shorter, faster, and in real-time.
- 2. Consumers conduct conversations 24/7.** An information economy has evolved into a conversation economy; an attention, experience and emotion economy.
- 3. Consumers are offered increasing quantities of information at increasing speed.** Consumers must filter and judge content for its timeliness, usefulness and correctness.
- 4. Visual information reigns supreme,** from pictures to infographics and video.
- 5. Consumers trust other consumers more than traditional institutions.** The “Groundswell”
- 6. The consumer is in control.** The result of the new hyper-connectivity, combined with the ability to filter information and take advice from other consumers.
- 7. Large numbers of consumers now group together online** to buy collectively and to secure discounts.
- 8. Consumers are assisted by search engine developments.** Search engines such as Google strive to index all forms of content.
- 9. Location-based services are gaining popularity** rapidly as a result of the increased use of mobile devices and more possibilities.
- 10. Consumers long for personalisation and belonging.** The internet has made the world more transparent and bigger, but at the same time smaller. The web plays a role in new processes of individualisation and tribalisation.

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By REED ALBERGOTTI | CONNECT

Facebook's **FB +2.10%** move to let teenagers share items more widely reflects growing competition among social networks for the attention of teenagers, and the advertisers that want to reach them.

On Wednesday, Facebook said it would **let users between the ages of 13 and 17** make posts "public" so that they can be seen by anyone on the network. Previously, teenagers' posts could only be seen by their friends and "friends of friends."

With the shift, Facebook will operate more like rivals such as Twitter, which allow teens to share publicly; Twitter, unlike Facebook, also allows users to create anonymous or pseudonymous accounts. Analysts said that Facebook risks losing the next generation of



— Reuters

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Source | The Wall Street Journal | 17 Oct 2013 | <http://on.wsj.com/H3Uvf0>

comment more broadly than Twitter.

"This is about monetizing kids and teens," said James Steyer, founder and chief executive

introducing **Snapchat Stories**



Source | www.snapshot.com

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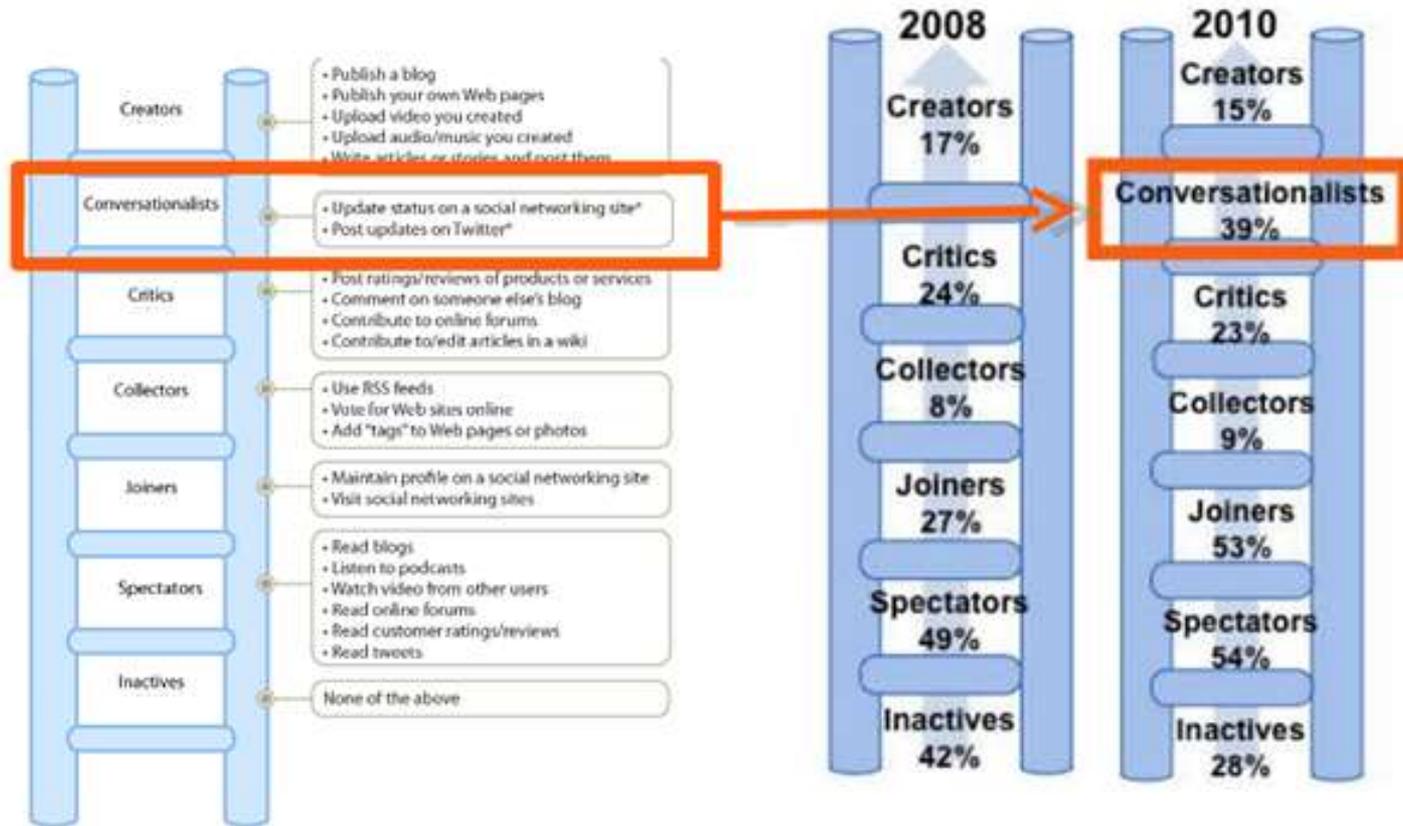
Conversation Economy

“Markets are conversations”

Source | Rick Levine e.a. | 1999 | The Cluetrain Manifesto

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Social Technographics



Source | Forrester Research's European Social Technographics® 2010 | 'The Rise Of The Joiners And The Conversationalists' by Nate Elliott | http://www.forrester.com/rb/Research/european_social_technographics%26%23174;_2010/q/id/57642/t/2



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Getting to know Namibia

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The Caprivi region, the long finger like extension in northeast Namibia, was annexed to then German South-West Africa give Germany access to the Zambezi River.

[Learn more about Caprivi](#)



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We Love you Bob Barker!



Bob Barker! Bob Barker, Probably most famous for hosting CBS's The Price Is Right from 1972 to

2007. When his wife Dorothy Jo died, he became an advocate and a activist for animals ...

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Money but no Brains!



Dear Animal Friends! Just let us spread the news about what the Trump brothers are doing

in Africa, and let the World know the sad truth! ...

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Pony the Orangutan Prostitute!



Never Again! Pony the Orangutan was found by the Orangutan

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Thursday, 04 August 2011 13:20

Hunting Giraffe Safari. Price \$ 3800. Help us stop this madness!





Karin Elgin-Nijhuis heeft de foto van The Perfect World gedeeld.
28 maart

Please sign and Share!

[http://www.theperfectworld.com/petitions/item/23-hunting-giraffe-safari-price-\\$3800-help-us-stop-this-madness](http://www.theperfectworld.com/petitions/item/23-hunting-giraffe-safari-price-$3800-help-us-stop-this-madness)



Vind ik leuk · Reageren · Delen

Lean Backward Modus



<http://www.maclife.de/ipad/hardware/>
werbepot-macht-sich-ueber-das-ipad-lu

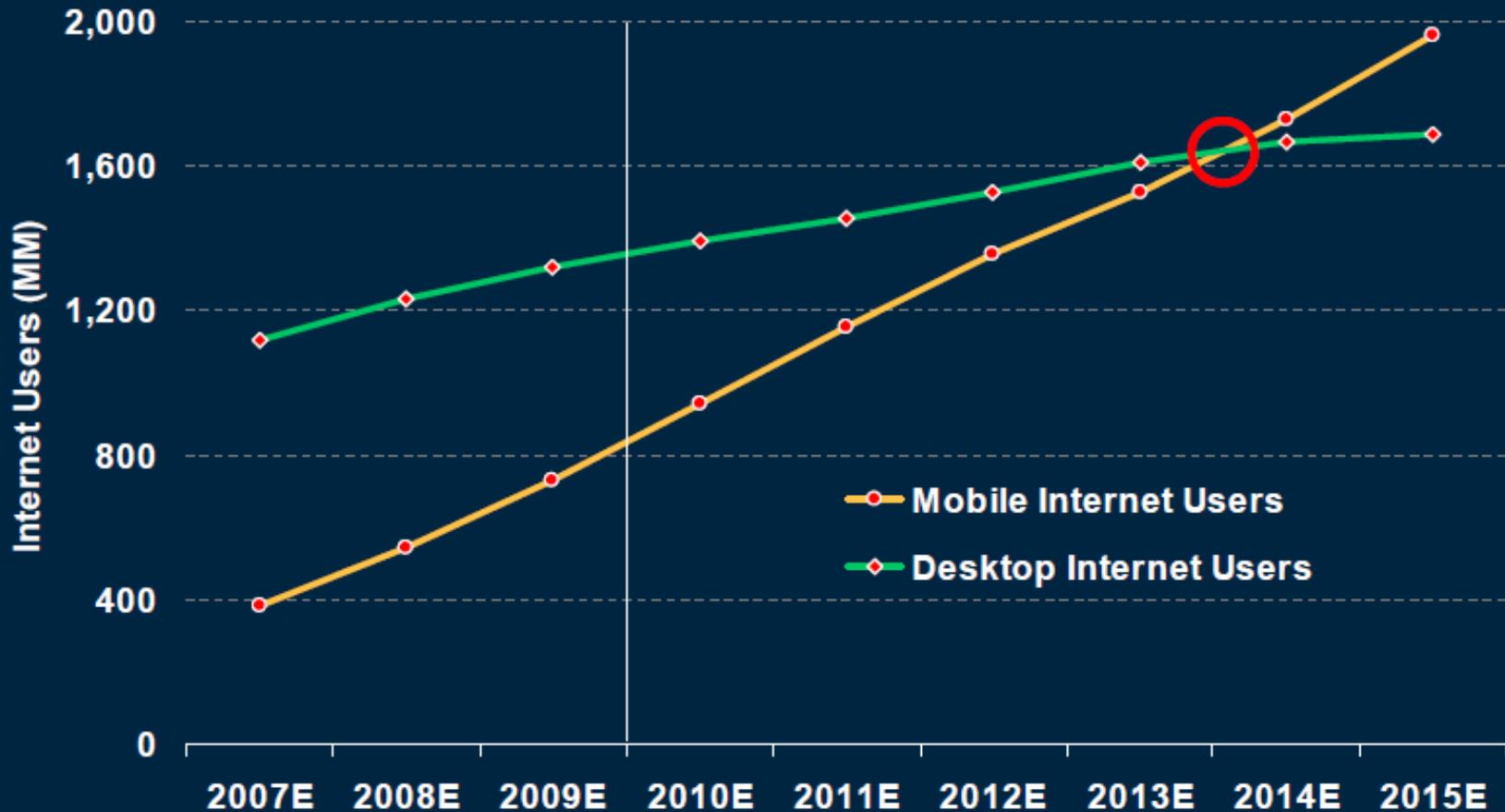
Always on...



<http://www.flickr.com/photos/misbehave/2352753067/>

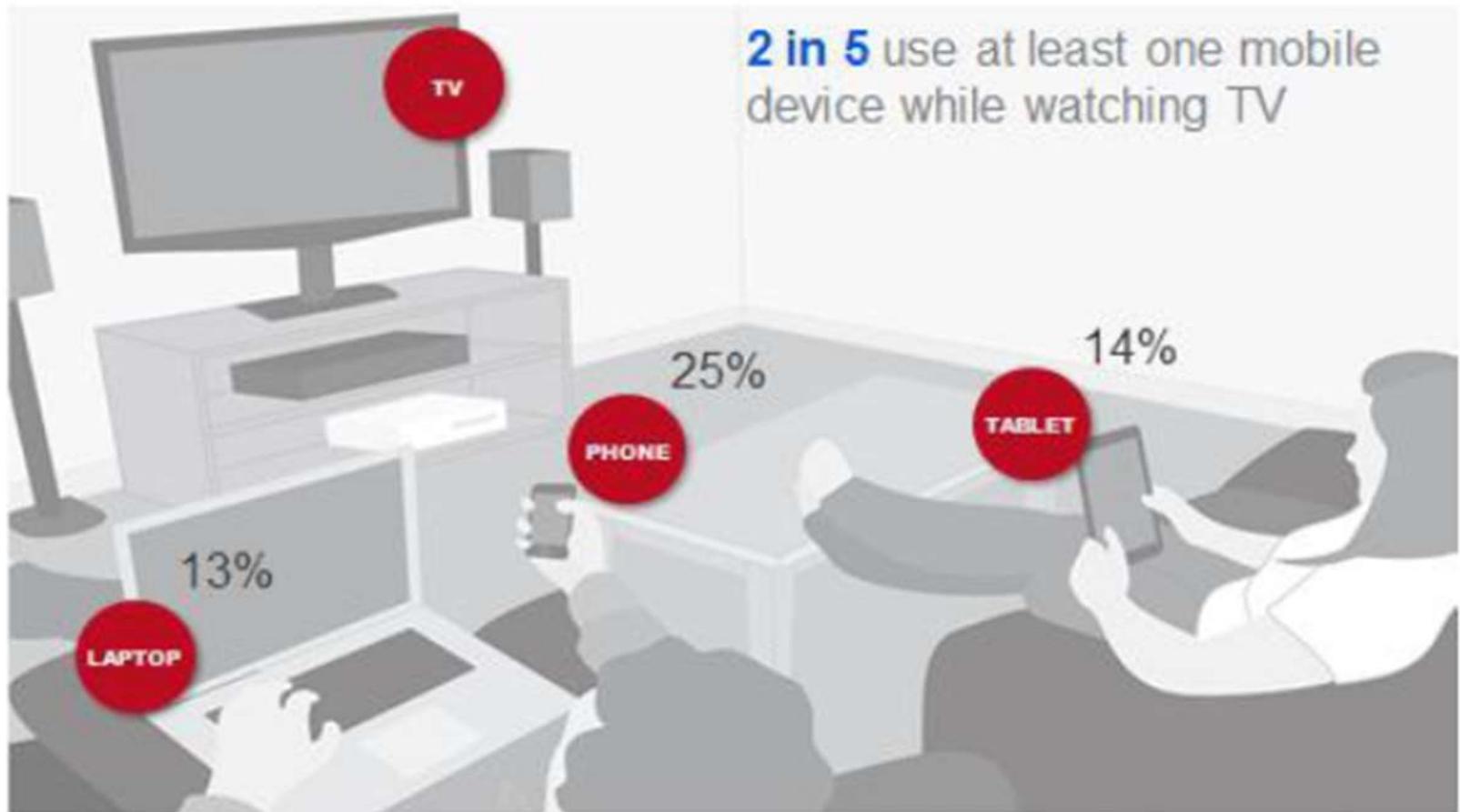
Mobile Users > Desktop Internet Users Within 5 Years

Global Mobile vs. Desktop Internet User Projection, 2007 – 2015E



Multi-Screening

Users are multi-screening while watching TV



Source: 3 Screen Owners Only
D1a/D5: Which did you use for your main activity? / Did you also use any of the following?
Base: Primary TV usage occasions (369)

Conversation Economy

“Markets are conversations”

Source | Rick Levine e.a. | 1999 | The Cluetrain Manifesto



Ten Key Trends in Technology and Consumer Behaviour

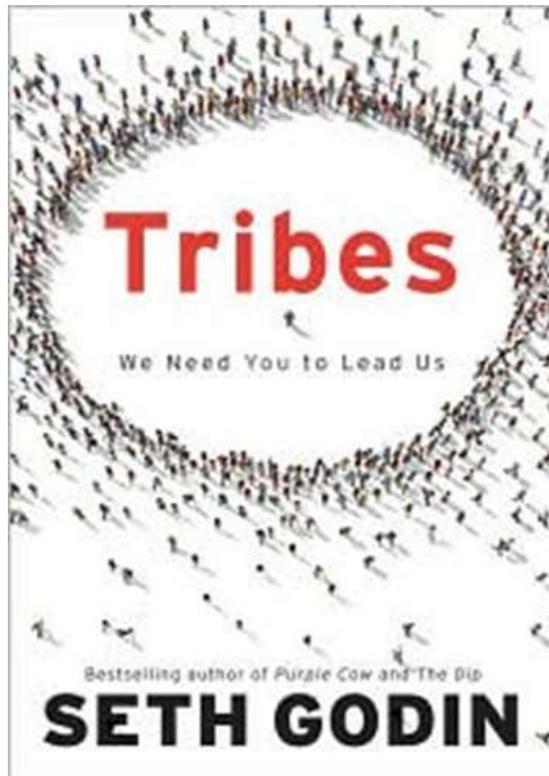
- 1. Communication is increasingly mobile** as well as more immediate; shorter, faster, and in real-time.
- 2. Consumers conduct conversations 24/7.** An information economy has evolved into a conversation economy; an attention, experience and emotion economy.
- 3. Consumers are offered increasing quantities of information at increasing speed.** Consumers must filter and judge content for its timeliness, usefulness and correctness.
- 4. Visual information reigns supreme,** from pictures to infographics and video.
- 5. Consumers trust other consumers more than traditional institutions.** The “Groundswell”
- 6. The consumer is in control.** The result of the new hyper-connectivity, combined with the ability to filter information and take advice from other consumers.
- 7. Large numbers of consumers now group together online** to buy collectively and to secure discounts.
- 8. Consumers are assisted by search engine developments.** Search engines such as Google strive to index all forms of content.
- 9. Location-based services are gaining popularity** rapidly as a result of the increased use of mobile devices and more possibilities.
- 10. Consumers long for personalisation and belonging.** The internet has made the world more transparent and bigger, but at the same time smaller. The web plays a role in new processes of individualisation and tribalisation.

Consumers long for personalisation and belonging



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Consumers long for personalisation and belonging



Source | <http://www.thisismyedinburgh.com>

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The first UNESCO City of Literature, a cosmopolitan capital of culture, and one of the most beautiful and vibrant cities in the world, Edinburgh has been inspiring people for centuries.

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This Is My Edinburgh



Marina Crolla

Restaurateur of Angels with Bagpipes. [Read More...](#)



Welcome/ Holland.com/cityweblogs

The Netherlands has many cities, each with its own unique identity. Just ask the people who live there. People who know where to find the most interesting museums or the best café in town. People who can tell you where to find the lesser known shopping streets or a great place to go out on a Tuesday night. And people who want to tell you all about their city. It's like having friends in the Netherlands.



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Eindhoven



Maastricht



The Hague



The Hague



Amsterdam



Region Arnhem-Nijmegen



Rotterdam



Amsterdam



Rotterdam



Utrecht



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E-marketing for Tourism Destinations



Ten
Key Trends
in
Technology
and
Consumer
Behaviour

Ten
Key Trends in
E-marketing

Ten
Keys to
Success
in
E-marketing
by
Destinations

Seven
Focal Points
for
DMOs

The image shows a desert landscape with ancient Egyptian stone statues. In the foreground, there are large, weathered stone blocks and a dark shadow. In the middle ground, two large stone statues are visible, one with a tall, conical headdress. The background is a clear blue sky. A semi-transparent grey banner is overlaid at the bottom of the image, containing the text "Ten Key Trends in E-marketing" in a purple, serif font.

Ten Key Trends in E-marketing

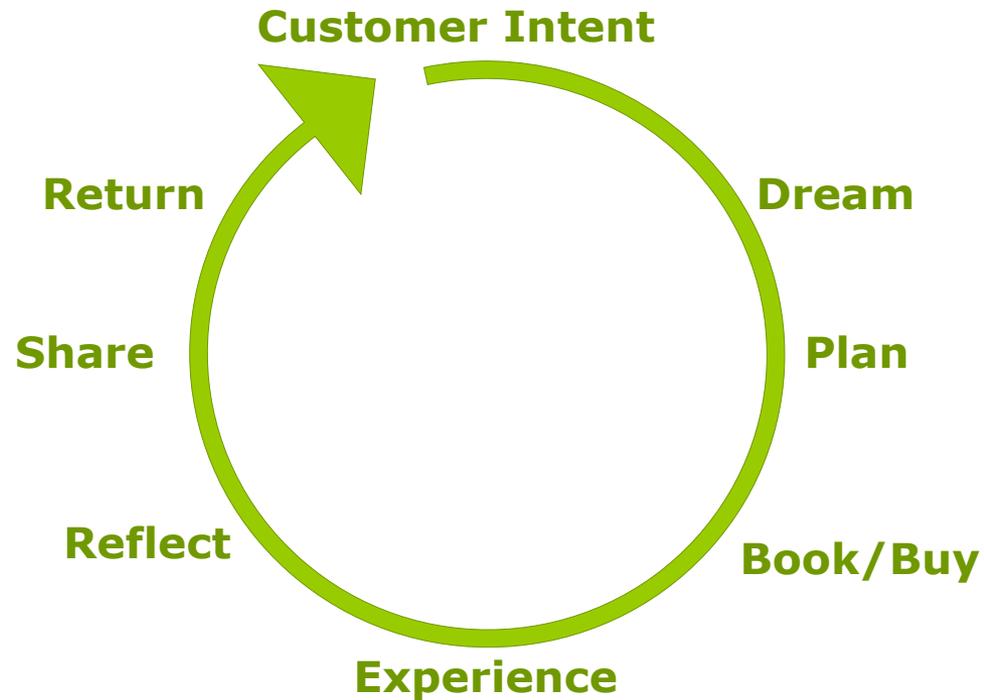
Ten Key Trends in E-marketing

- 1. The 'customer journey' is continuously becoming more complex.** An increasing range of factors, platforms and channels influence the decision-making process.
- 2. Marketers need to think in terms of cross-media concepts** and focus on finding the optimal match of messages with channels, platforms and devices.
- 3. Owned and earned media (inbound marketing) has increased in importance** while paid media (outbound marketing) has become less effective.
- 4. Inbound marketing is about drawing people in,** by synchronising their efforts across search, social and content, nurturing leads and converting to 'hub sites'.
- 5. Understanding touch points with consumers is essential.** Traditional segmentation and CRM can now be enhanced.
- 6. Online content is very powerful** and the level of consumer engagement determines the success of content.
- 7. There are new approaches to measuring success.** Including now these four key areas of measuring success: involvement, interaction, intimacy and influence.
- 8. The need for continual content creation and distribution** may require re-focussing of the entire organization.
- 9. The marketing planning timetable and resources need to adapt to technological developments.** Communication is immediate and occurring across different media, requiring more layers of activity.
- 10. Optimization for mobile devices is vital.** Marketers must invest in mobile-optimized websites and email, apps and location-based services and offers.

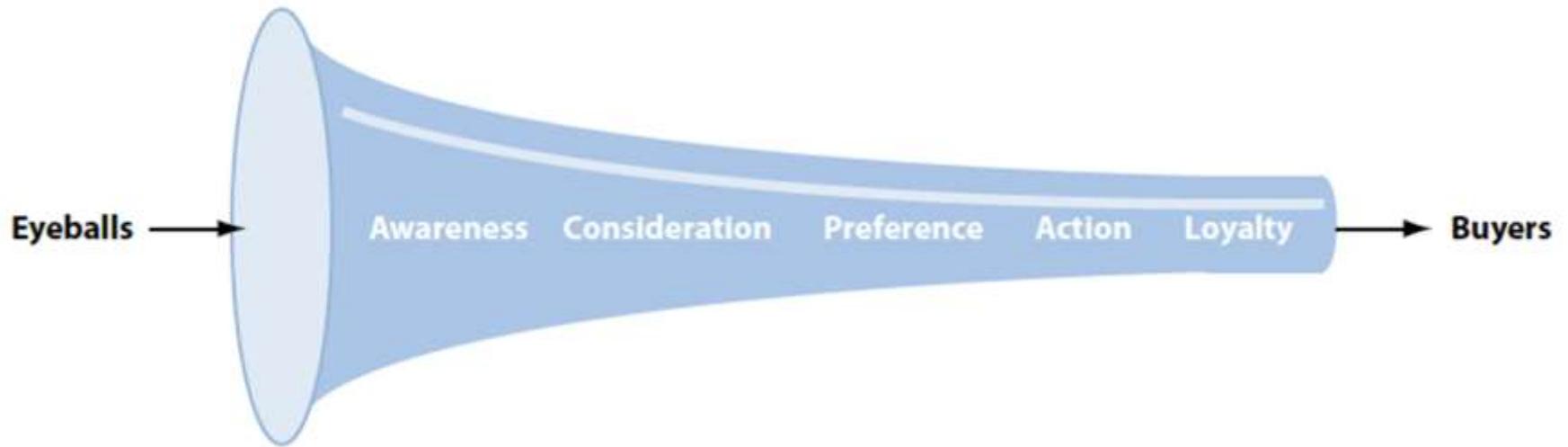
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Internet Services

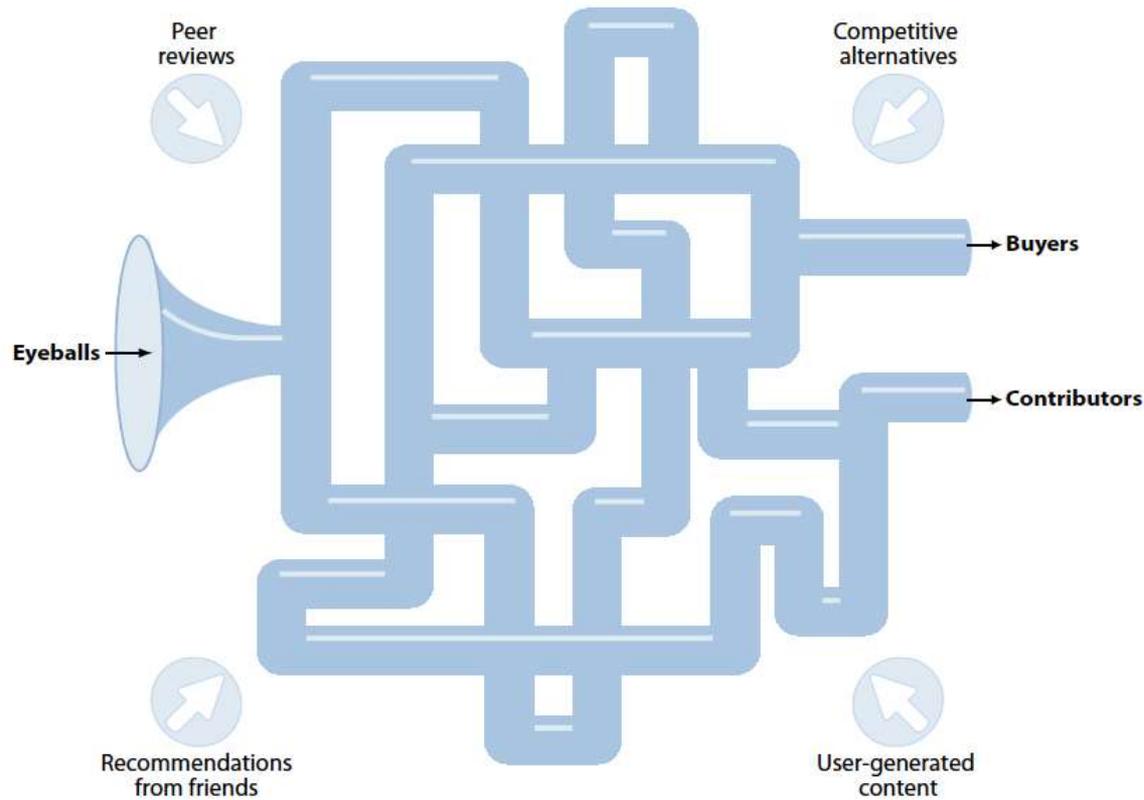


The Traditional Marketing Funnel



Source | Forrester | Engagement, a New Marketing Metric

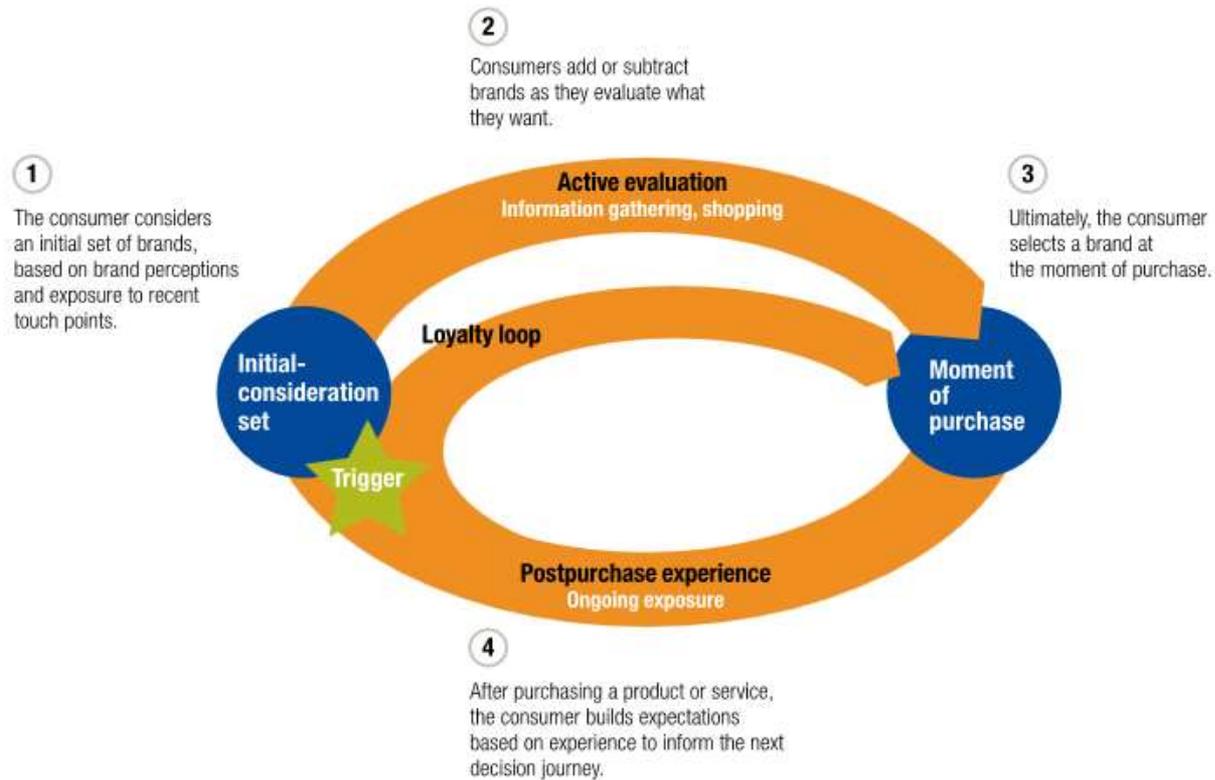
Marketing Funnel: Complexity and Engagement



Source | Forrester | Engagement, a New Marketing Metric



Customer Decision Journey McKinsey



Source | David Court, Dave Elzinga, Susan Mulder, and Ole Jørgen Vetvik | The consumer decision journey | 2009 | McKinsey&Company | http://www.mckinsey.com/insights/marketing_sales/the_consumer_decision_journey

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E-marketing & Content Marketing

E-marketing is very much about the marketing of **content** :

“getting the right content
in front of the right person
at the right device
at the right point in their decision-making process
to drive the right action”.

E-marketing for Tourism Destinations



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Ten Actions for Successful E-marketing for Destinations



Ten Actions for Successful E-marketing for DMOs

1. Build strong **brands**
2. Reach as many (potential) customers as possible
3. Offer (potential) customers **high quality content** and other **internet services** at each stage of the customer journey
4. Make smart combinations of **owned, earned and paid media**
5. Make the most of the internet as a **truly collaborative** environment
6. Socialize and develop **authority and thought leadership**
7. Deliver **sales**, directly or indirectly
8. Maximise the lifetime value of customers
9. Evaluate and benchmark performance, demonstrating **added value** and return on investment
10. Commit to continual **learning**

Focal Points for DMOs

- ✓ **Branding** The changes in media and influences landscape described above ask for **focus and fierce commitment, coherency and consistency** and a truly collaborative approach.
- ✓ **Innovation** Think in terms of **service** and innovating in each and all off your e-marketing plans and activities and offer internet services at every stage of the **customer journey**.
- ✓ **Value** The internet has made value chains transparent. Consumers expect the roles of, and value added by, each stage to be clear. They themselves have become part of the value chain. DMOs are therefore also continuously challenged to create and show **added value**.
- ✓ **Re-focussing** DMOs are wise to focus on synchronising marketing efforts across search, social and content and on making **smart combinations** of **owned, paid and earned media**, creating integrated experiences.
- ✓ **Skills** DMOs need to develop **(partly new) roles and skills** and adapting their structure. These include skills narrative management, dialogue, gamification, monitoring, measuring success in a truly multichannel environment...
- ✓ **Intelligence** There is a wealth of intelligence that DMOs can access quickly and economically.
- ✓ **Integration** DMOs will need to make **integration a characteristic of their strategy**, even more than they are already challenged to do due to the fragmented nature of the industry, products and services.

Place Branding



Sources:

Robert Govers & Frank Go (2009), Place Branding. Glocal, Virtual and Physical Identities, Constructed, Imagined and Experienced

Robert Govers (2011), Understanding Place Branding. Presentation (Part 1 and 2) at www.prezi.com

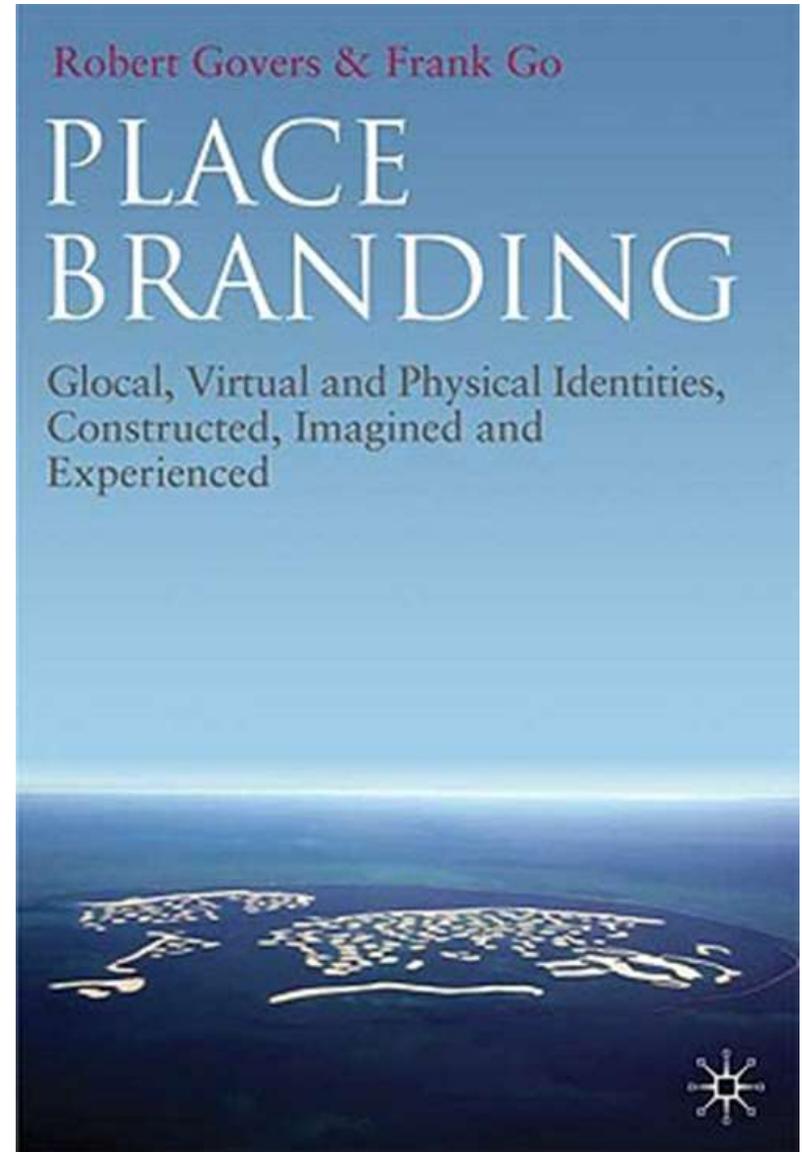
Simon Anholt (2010), Places: Identity, Image and Reputation.

Simon Anholt (2007), Competitive Identity: the new brand management for nations, cities and regions

Simon Anholt (2008), Place Branding: Is it marketing, or isn't it? Place Branding and Public Diplomacy 4(1), pp. 1-6

Place Branding

Robert Govers & Frank Go | 2009 |
Place Branding.
Glocal, Virtual and Physical Identities,
Constructed, Imagined and
Experienced



Place Branding

“A place brand is ... **a promise** that describes a compelling experience in realistic but competitively differentiated terms and that offers the visitor a distinct and desired benefit.”

George Whitfield | TEAM Tourism Consulting |
DMO World Newsletter, issue 3

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Branding

What is
your promise?



Branding

“A brand is the **precise** and **pinpointed** communication of your company, your product or service, the **value** it stands for and the **feeling** your customer will get from it.”

Source | Kim A. Castle & W. Vito Montone, Why Publications



Branding

Four questions a brand
(explicitly or implicitly)
answers:

1. What is it that I do?
2. WHY are WE doing it?
3. Why is it important?
4. What does it change?



Consumers long for personalisation and belonging



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Trends in Technology and Consumer Behaviour

Can you think of a trend
not mentioned and included yet
in the Handbook?

Thank you

Karin Elgin-Nijhuis
info@karinelginnijhuis.nl

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