



Conference Communication

Managing change in tourism destinations: Key issues and current trends

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ABSTRACT

This conference communication illustrates the major outcomes emerging from the EIASM Conference on Tourism Management and Tourism Related Issues held in Nice (France), September 20–21, 2012. While a number of managerial issues pertaining to the tourism field were dealt with, this communication covers three specific areas of interest for destination management and marketing: (1) the increasing competition among tourism destinations and the rise and consolidation of BRIC countries as outbound travel markets; (2) the modification of the target markets for established tourism destinations; and (3) the increasing importance of collaboration and especially coopepetition not only within a tourism destination but also among destinations.

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1. Introduction

This article is a conference communication related to the 2nd International Conference on Tourism Management and Tourism Related Issues organized by the European Institute for Advanced Studies in Management (EIASM) and held in Nice, France, September 20–21, 2012. The conference, hosted by the University of Nice Sophia Antipolis – GREDEG CNRS, was attended by a large number of academics, representing 17 countries. It gathered papers at the cutting edge of contemporary research in tourism, with topics ranging from destination management and marketing to strategies and performance in the tourism sector, to social responsibility and sustainability in the tourism sector, to ICT applications in tourism. The conference has proved to be a forum for the advancement of knowledge within the tourism field in general and the destination marketing and management field in particular. More specifically, in this communication we illustrate several key issues and current trends that were discussed during the wrap-up session conducted by the chairs of the tracks and sessions related to destination management and marketing:

1. the increasing competition among tourism destinations and the rise and consolidation of BRIC countries as outbound travel markets;
2. the modification of the target markets for established tourism destinations;

3. the increasing importance of collaboration and especially coopepetition not only within a tourism destination but also among destinations.

Each of the aforementioned issues and trends were identified as they appeared to be very relevant for a number of academic delegates, who emphasized in their papers their managerial and policy implications and their contribution to the development and marketing of tourism destinations.

Consistent with the outcomes of the first edition whose best papers were published in a Special Issue of the journal *Anatolia* titled “Managing Tourism in a Changing World” (Eds. R. Baggio & M.M. Mariani), vol. 23(1) and an edited book with Routledge titled “Managing Tourism in a Changing World: Issues and Cases” (Eds. Baggio, Czakov, & Mariani, 2013), this second edition attracted a number of high-quality submissions that are being organized into two further books titled “Tourism Management, Marketing and Development: The Importance of Networks and ICTs” and “Tourism Management, Marketing, and Development: International Perspectives on Performance, Strategies, and Sustainability”, which will be published by Palgrave Macmillan respectively in September 2014 and September 2015.

2. Key issues and current trends

The key issues and current trends analyzed during the conference are:

1. the increasing competition among tourism destinations and the rise and consolidation of BRIC countries as outbound travel markets;

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2. the modification of the target markets for established tourism destinations;
3. the increasing importance of collaboration and especially coopetition not only within a tourism destination but also among destinations.

In what follows we scrutinize each and every of the aforementioned issues and trends:

2.1. *The increasing competition among tourism destinations and the rise and consolidation of BRIC countries as outbound travel markets*

The increasing competition among tourism destinations is a major trend that seems to become more and more relevant over time (Mariani & Baggio, 2012). According to the UNWTO forecasts included in *Tourism Towards 2030*, international arrivals in emerging economy destinations are expected to keep growing at double the pace (+4.4% year) of advanced economy ones (+2.2% a year). As a consequence, the share of international tourism to emerging economies will surpass in 2015 that to advanced ones, and many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East.

In this framework BRIC countries are consolidating as outbound travel markets. A clear understanding of the evolution of the aforementioned markets is pivotal to develop actions to meet BRIC customers' demand, adjust tourism policies and fine-tune the strategies of interested destination managers. A robust methodology has been worked out in the specific context of the Russian market (Furmanov, Balaeva, & Predvoditeleva, 2012). More specifically the resulting forecasts indicate that Mediterranean countries are among those countries with the highest growth rate in the three years ahead, with Tunisia, Egypt and Israel leading the ARIMAX ranking with expected growth rates of 42.2%, 31.3%, and 31.1% respectively over the period of 2012–2014 (Furmanov et al., 2012). While not taking explicitly into account new phenomena of future political instability, the forecasts carried out can point to several interesting trends of the Russian demand for travel and tourism.

On the other side, the attractiveness of Italy as a tourist destination for Russians has been explored by measuring the unstructured images held by Russian travel intermediaries for such an established European destination as Italy (Mariani, 2012). Italy as a tourism destination displays several major strengths such as the variety of its offer (featuring history and culture as well as eno-gastronomic assets) and the lifestyle and hospitality of its people. Moreover it appears that after their first Italian experience with package tours including the "classic" Italian arts cities (and the Emilia-Romagna region as well) most Russian tourists prefer to go back to Italy and either buy a tour featuring different destinations or construct their trip by themselves (Mariani, 2013). Major weaknesses of the Italian supply (the scarce proficiency in the foreign language, the delay in replying to e-mail and inquiries, the inadequacy of websites, the unreliability of Italian standards of hotel classifications) have to be coped with to match this growing demand, particularly for the Southern part of Italy. Accordingly it appears that more effort should be directed towards the construction of effective educational tours for perspective buyers.

The methodologies developed in the aforementioned papers for the specific cases of Russia (as a growing outbound travel market) and Italy (as an established tourism destination) can be leveraged in order to fruitfully analyze how established tourism destinations can tap the potential of growing outbound travel markets.

2.2. *The modification of the target markets for established tourism destinations*

Juxtaposed to the increasing competition among tourist destinations, we can identify a further trend: the modification of the

target markets for established tourism destinations. Indeed classical target markets are changing and at the same time new target markets are emerging. Their perception of the destination's image variables, in relation to the importance they attach to them, is vital for the marketing and management strategies of Destination Management Organizations (DMOs).

According to Dolnicar (2008, p.147), who has offered a comprehensive record of the approaches and developments in segmentation 'a wide variety of alternative techniques can be used to identify or construct segments. Approaches range from simple commonsense segmentations (where tourists are split on the basis of a predefined personal characteristic) to multidimensional data-driven approaches where a set of tourist characteristics is used as the basis for grouping. Of course, managers may be interested in exploring combinations of simultaneously constructed market segments'. The study conducted by Vitouladiti on an established island destination in Greece (Vitouladiti, 2012) combines one of the simple commonsense approaches (demographic characteristics) with a data driven approach (important benefits sought by the visitors) in order to create market segments and achieve a deeper understanding of the various segments characterizing today's competitive and evolving business environment. Firstly, the research points to a change of needs and desires of the classical target markets, as well as an evolution in their profile, making them more demanding. At the same time new and currently unidentified target markets are emerging, which have never been targeted. Therefore, the study confirms that improvements in education and welfare in European countries have diversified the profiles of the consumers, their wants, motives and preferences and have increased the quality standard demanded.

Secondly, the perceptions of these target markets (the classical and the new ones) were used in order to separate the naïve from the reevaluated destination image. The research conducted reveals the positive and negative modifications of the image variables, in relation to their importance for the visitors, and proves that experience has an extensive research interest and can guide the destination marketers.

This innovative approach indicates that the most important variables for destination choice are the ones modified more negatively: indeed the emerging target markets have expressed the more negative comments. This is an issue of great importance since these segments are the more likely to be targeted by the competition. As a consequence, destination marketers should combine the marketing mix variables in order to approach the new segments and satisfy the evolved demands of the classical clientele. The study offers several implications for a series of immediate actions which concern targeted policies in infrastructure, superstructure and projects aimed to enhance the natural and cultural environment and to strengthen the offered product. Moreover, it offers guidelines for product differentiation and suggestions for the best allocation of declining marketing budgets to effective advertising campaigns.

2.3. *The increasing importance of collaboration and especially coopetition not only within a destination but also among destinations*

While competition among tourism destinations is increasing significantly, competitive advantage is typically sustained on a shorter and shorter span of time. This makes collaboration and cooperation within a tourism destination and among destinations a relevant strategy for a destination to achieve a competitive advantage in the longer run (Buhalis & Cooper, 1998; Fyall, Garrod, & Wang, 2012; Wang & Xiang, 2007).

On one hand, collaboration between the public sphere and the private sector is crucial for destination marketing and management (Mariani & Kylanen, 2014). As underlined in one of the conference

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