Building synergies and understanding between tourism operators and DMOs at the regional level: an Australian case-study

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Destination Marketing Organisations (DMOs) aim to undertake marketing and management activities at the destination level that seek, among other things, to improve destination competitiveness and contribute to a sustainable future. Part of this process involves the ongoing evaluation of DMO activities in achieving these goals. This study identifies and analyses the outcomes of a destination workshop program implemented by Tourism New South Wales (TNSW), a state tourism marketing organization in Australia. Through the engagement of and consultation with tourism industry

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In an increasingly competitive environment, governments are recognising the importance of marketing and managing regional tourism destinations in order to generate sustainable economic benefits for the communities involved. Buhalis (2000:97) describes destinations as 'amalgams of tourism products, offering an integrated experience to consumers'. They can be defined geographically, politically or perceptually, that is, by physical or judicial boundaries or, more subjectively, by how they are interpreted by consumers. Marketing is an essential part of attracting tourists to a destination area. While individual tourism operators develop their own marketing strategies to target visitors, destination marketing organizations have the role of working with tourism operators and other stakeholders to develop a coordinated destination marketing strategy and to allocate resources to market the entire destination. This is a challenging task, as individual tourism operators often have varying goals, market knowledge, expertise and strategies and produce a broad range of tourism products across a spectrum of industry sectors. It is therefore the aim of DMOs to merge conflicting stakeholder interests and help these operators identify a common strategic direction that will benefit all stakeholders and the destination as a whole (Prideaux and Cooper, 2002).

A comprehensive framework for marketing the competitive destination of the future was outlined by Buhalis (2000). He synthesized various techniques that can be used by destination managers and marketers 'in order to develop and implement their strategic plan and marketing policies'

(Buhalis 2000: 97). In his discussion of the criteria for successful tourist destinations, Buhalis proposed several strategies that could be adopted by DMOs to enhance destination competitiveness. In particular, he highlighted the need for the public and private sectors to adopt 'societal marketing strategies'. These stress the importance of monitoring tourist satisfaction levels rather than solely focusing on how to increase tourist numbers. He also identified host-guest interaction as an integral part of the tourist experience and recognised that the type and extent of infrastructure development has implications for the types of tourists that will be attracted. Buhalis contends that whilst individual tourism operators should contribute to the achievement of these goals it is the DMOs who 'should be the guardians of the image and resources of destinations' (Buhalis 2000:109). In order to meet these goals and effectively compete with other destinations, he suggested that DMOs work with destination stakeholders to create a unique product offering and tourist experience. Rather than competing with each other at the destination level, he proposed that tourism industry operators should join forces and pool resources to develop and implement comprehensive marketing strategies which enable them to compete with other destinations (Buhalis and Cooper 1998).

The importance of collaboration among tourism industry stakeholders has been increasingly recognized in the tourism literature (Jackson and Murphy 2002; Prideaux and Cooper 2002; Fyall, Leask and Garrod 2001). Collaboration is 'a process of joint-decision making

contd....

stakeholders the DMO workshops
aimed to identify how to more
effectively market regional
destinations. The findings of an
exploratory study of tourism
operators who attended the TNSW
workshops held within two regional
destination areas in New South
Wales are presented. Overall, the
study identified a lack of strategic
direction at the regional destination
marketing level and limited
cooperation and partnerships
among tourism industry operators
as impediments to the future
success of tourism in these
regions.

restaurant but the sum of all individual tourism products, services and experiences they consume at the destination region (Pine & Gilmore1999). Interorganisational collaboration is a means by which tourism businesses can work together to minimize external threats and maximize shared opportunities rather than to confront the challenges of the future in isolation (Fyall, Leask and Garrod, 2001). DMOs should act as a catalyst for cooperation and collaboration among individual tourism operators.

Through the development of collaborative partnerships and networks among stake-holders DMOs can increase the likelihood of developing a unique and recognisable brand for the destination (Prideaux and Cooper 2002). This view is supported by Gilbert (1990) who suggested that destinations should seek to become a 'status area' by offering unique product attributes in the eyes of the desired target market. In doing so, destinations are more likely to achieve a higher rate of visitor satisfaction, attract repeat visitation and establish loyalty. In the absence of the coordination, information and marketing expertise provided by DMOs, and a united approach to destination marketing, destination regions are more likely to convey a confused image and a non-cohesive message regarding their brand to the consumer. This is particularly true for countries like Australia where the majority of tourism suppliers are small independently owned and operated firms with few employees and limited marketing resources (Australian Government 2004).

New South Wales is Australia's most populous state, the largest state economy, whose capital Sydney is Australia's major tourism gateway. Tourism is worth over $23 billion to the NSW economy and employs over 8% of the workforce (TNSW 2006). Tourism New South Wales is the government agency responsible for tourism promotion of the state. A recent initiative of Tourism New South Wales is the 'Destination Development Program', which reflects the broad strategic goals identified by Buhalis with respect to public-private sector partnerships to promote destination competitiveness. The main purpose of the program is to more effectively market New South Wales destinations and experiences through sharing strategic directions, knowledge and expertise.

Destination Development Workshops are a core component of the program and a means of engaging Regional Tourism Organisations (RTOs), Tourism Managers and local tourism operators. The workshops will be run over a two-year period and aim 'to assist tourism operators to pinpoint the key experiences and attractions that potential visitors are expecting within a particular destination, match tourism products with consumers' needs, and identify key messages for use in promotional activities' (Tourism NSW 2006).

An important aspect of the Destination Development program was a post-workshop study to evaluate the outcomes of the workshops conducted in the Capital Country and Snowy destination regions. This evaluation was undertaken by the Sustainable Tourism Cooperative Research Centre (STCRC) on behalf of Tourism New South Wales (Firth, Dwyer and March 2006). The study focused on the perspective and opinions of the tourism industry stakeholders who attended. In particular, the evaluation study aimed to investigate whether workshop participants' knowledge of consumer markets, destination products and experiences, destination consumer messages and partnership opportunities had increased as a consequence of attending the workshops.

Study context

As New South Wales is so large and diverse, TNSW divided the State into eight campaign zones for the purpose of destination marketing. They include Sydney, Short breaks from Sydney, North Coast, South Coast, Snowy Mountains, Heart of Country NSW, Outback NSW and Lord Howe Island (TNSW 2006). The geographical

million who generated $347 million in expenditure. Capital Country accounts for 4.8% of visitors to regional NSW. Eighty two percent of visitors to Capital Country are from intrastate and the main purpose of visit to this area is visiting friends and relatives (41.5%) followed by holiday (38%) (TNSW 2006).

The Snowy Mountain region falls within the Snowy Mountains and NSW High Country campaign zone. This zone is located in Southern NSW and incorporates the townships of Cooma, Jindabyne, Perisher, Thredbo, Tumbarumba and Tumut. It also features four of Australia's highest peaks including the highest mountain, Mount Kosciuszko and over 230km of snow sports trails. In 2005, 1.14 million people visited this region spending about $476 million. Seventy nine percent of visitors were from intrastate and holiday/leisure was the main purpose of visit for 72% of visitors. Overall the Snowy region received 4.0% of visitors to regional NSW (TNSW 2006). This paper will focus upon the workshop process and the assessment of its outcomes in order to gauge its success as a tourism development strategy.

Method

An exploratory research design was used in the study. This involved a phone survey of workshop participants of the workshops held in the two regions in July 2006. A semi-structured questionnaire comprising open-ended questions sought information regarding new product development, advertising and promotion and cooperation and partnerships at the two chosen destination regions, the 'Capital country' and 'Snowy region' of New South Wales . Using the Destination Workshop participant contact list provided by Tourism New South Wales, the 80 workshop attendees were contacted to complete the survey in 2006, resulting in a 33% response rate or 27 completed questionnaires. Sixteen respondents were from the 'Capital Country' region and eleven were from the 'Snowy'

region. In terms of the industry sectors represented in the sample, a majority were from the accommodation sector (37%), followed by local government organizations (18.5%) and attractions (18.5%). Most respondents had lived in their current region for more than ten years (51.5%) and had been involved in tourism at their destination region for more than nine years (52%).

Results

The findings of the study are presented according to the criteria proposed by Buhalis (2000) for successful destinations. They include:

♦ Recognising the unique attributes and limitations of a destination, as well as their particular geographical, environmental and sociocultural characteristics;

♦ Monitoring tourist satisfaction levels;

♦ Understanding the travel motivations of tourists and destination market segments and developing appropriate product offerings to cater for their needs;

♦ Developing a suitable destination marketing mix;

♦ Bringing individual tourism operators together to cooperate and to pool resources rather than to compete.

Tourist satisfaction

Respondents were asked to indicate on a scale of 1-5 (1 = Not very well, 5 = Very well), how well the existing products/ experiences at their destination meet the needs of their visitor markets. Industry operators from the Capital Country region believed they were catering for the needs of their target markets reasonably well (mean = 3.7) but there was room for improvement. There was agreement on the main reasons why people visit their destination such as the natural environment, farm activities, wineries and its location half way between two major cities; Sydney and Canberra.

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to the regions were cited as couples, seniors, families, and school groups.

Of course, there is always a problem with the accuracy of firms' perceptions of the quality of their service delivery. Information gained directly from the consumer is needed before one might have confidence in claiming that tourists are satisfied that operators in these regions are meeting their needs. Given the shift globally away from competitive pricing towards service improvement (Cetron 2001), it is recommended that firms in conjunction with their DMO undertake consumer satisfaction surveys and develop an action agenda based on survey results.

Some of the types of tourists that the two regions target in their marketing strategies (particularly couples and seniors) are increasingly demanding customized or personalised products. Consumers are increasingly demanding the opportunity to customize or personalise the products, services, and experiences they buy to their specific wants and needs, which is driving an expectation for almost universal customization (Dwyer et al 2007). Tourism operators in the two regions need to be aware of such trends and respond strategically.

Existing infrastructure/Unique product attributes

Respondents were questioned about the quality of existing tourism industry infrastructure such as the available accom-modation, variety of attractions, and transportation. They were also asked what additional products or experiences should be offered at their destination to enhance the visitor experience. Workshop attendees from the Capital Country cited various impediments to their ability to attract more visitors to the region including; a

Table 1 : Existing tourism infrastructure/Unique product attributes

Capital country region	Snowy Mountain region
"The Southern Highlands is not recognized as a regional entity in fact there is a lack of awareness of the region because it lacks a centerpiece attraction."	"One area that can be greatly improved is the attitude of locals toward the tourists. I have witnessed numerous occasions where the local business owners have been asked for general information about the area and have given nothing but a rude, short, unhelpful reply. It is like some people view the visitors as an inconvenience rather than recognizing the benefits they bring. This can only reflect poorly on the perceived friendliness of the locals in the region."
"We have so much potential in this area but don't utilize our resources to the best of our ability. We don't capitalize on our farms in this area and the Alpacas. There is so much farm potential here but people don't know how to take advantage of it."	
"This region only has passive recreational	"The problem with our region is there is a lack of

Source: Author's survey of tourism operators in Capital Country and Snowy region, July, 2006

(18.5), an educational facility (12.5%) and a recognized website (6.5%) would all help to attract people to the area and give visitors a reason to extend their stay. This was illustrated by some of the comments made by Capital Country tourism industry operators highlighted in Table 1.

Tourism operators in the Snowy region also identified a lack of attractions and tourist facilities to cater for visitors to the area. More specifically, operators cited the need for more guided tours (54.5%), accommodation (27.5%), organised camps/retreats (27.5%) outdoor educational activities (27.5%), more restaurants (27.5%), manmade attractions (18%) and more arts and crafts shops (18%). It was also recognized that the level of customer service needs to be improved for all markets visiting the region with some suppliers (18%) identifying the unfriendly local residents as impacting negatively on the tourist experience in the region. Several of the Snowy respondent statements presented in Table 1 reinforce these findings.

consumer (UNWTO 2002). As consumers material needs are satisfied they will require something more, they seek newer/richer/ deeper experiences. As people look for new meanings from their consumption of goods and services in a way consistent with Maslow's self-actualisation concept, their desire for self-actualisation becomes a search for a wider meaning and sense of worth beyond material possessions.

The assets of both regions position them to take advantage of the changing tourism environment (Cetron 2001, Nordin 2005, Dwyer et al. 2007). In particular new product markets that are expected to grow over time include Nature based tourism and Rural Tourism (UNWTO 2002). Both are closely related to the traditional and romantic idea of 'the good old days' pure and simple lifestyle, experiencing what is perceived as a 'healthy' lifestyle, with fresh air, wholesome food and exercise, getting away from a stressful and fast-paced city environment to the peace and tranquility of the bush; ? enjoying the friendly warmth and hospitality of country people; Thus, nostalgia of the origins, the need for recuperation of the lost link with nature, and the 'basics' of life, in an increasingly complex, highly organised, anonymous, congested, stressful urban and 'inhuman' (Krippendorf 1987) surrounding constitutes the principal attraction of rural areas. These assets may be expected to become more highly valued over time consistent with a growing search for the more 'authentic' in an ever changing world with a focus on nostalgia, roots, other cultures and identity, and an increasing interest in spiritual and intellectual activity (Nordin 2005).

Advertising and promotion

Respondents were asked to rate on a scale of 1-5 (1 = Not very well, 5 = Very well) how well the current advertising and promotional activities undertaken by the DMO communicate the products/experiences available at the destination. The overall response for the Capital Country participants was a mean score

of 3.15. Twenty-five percent of respondents suggested they could not afford to undertake any advertising or other promotional activities. It was suggested that the following additional marketing activities could be undertaken at the destination level: improvements to the state tourism website (greater focus on specific regions, increased links to individual operator websites) (25%), mass media (TV, radio, print) (25%), billboards (12.5%), exhibitions (12.5%) and the Internet (6.5%). Individual tourism suppliers from the Capital Country indicated that they were undertaking minimal marketing activities to promote their business due to budget constraints and a lack of marketing expertise. The respondent comments outlined in Table 2 reflect these views and allude to why operators place considerable value on the state DMO tourism website and on having a single government organisation oversee the marketing of their destination region.

When asked to rate on a scale of 1-5 (1 = Not very well, 5 = Very well) how well the current advertising and promotional activities communicate the products/ experiences available in the Snowy region, it was found that workshop participants perceived themselves to be doing quite well with an overall mean score of 4.4. It was suggested that the following marketing activities could be undertaken to improve the current position of tourism in the Snowy region; mass marketing by the state or regional DMO (27.5%), print media (27.5%), TV (9%), radio (9%), famil tours for travel intermediaries (9%), advertising through motoring organizations (9%), the development of a comprehensive website (9%). Eighteen percent of respondents stated they could not afford to undertake any marketing activities. The statements in Table 2 suggest that some tourism suppliers appeared to be aware of the limitations they face when undertaking advertising and promotion as an individual operator without cooperating with other tourism stakeholders. Several mentioned the issue of budget constraints and previous marketing experience as hampering

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Table 2 : Advertising and promotion

Capital Country	Snowy Mountains region
"We are not in the marketing game and do not have enough time and effort to put into it."	"Tourism New South Wales is doing a great job with the High Country campaign but in this region it is the mentality of the locals that is the problem because they won't act."
"There is no money to promote the area, so visitors have a good time once they are here, but its getting them here that is the problem."	"Tourism New South Wales are pushing packaging but it doesn't work in this region. We tried it for six months and only had one customer inquiry."
"We know what advertising and promotion we should be doing but trying to do it on a shoestring is another thing."	"Our region doesn't know who it is targeting. There are no goals set and no clear direction."
"There is a lack of money to spend on destination advertising. We rely much more on word of mouth and mailing lists."	"Our problem is that there is no designated tourism body to promote our area."
	"No real advertising and promotion is being done at the township level."

Source: Author's survey of tourism operators in Capital Country and Snowy region, July, 2006

Of more concern, is tourism operators' lack of awareness of the potential power of the internet in destination marketing and in day-to-day business activity, with less than 10 per cent of respondents in each region mentioning marketing on the web. Technology is by far the foremost management tool in achieving results and competitiveness in this business operating environment. The new Information and Communication Technology (ICT) enables segments to be identified and products and services developed and marketed to publics that share characteristics, attitudes, behaviours and interests. The benefits of e-commerce (commerce conducted over the Internet) include: easier access to new domestic and foreign markets and customers with global networks of people, businesses, governments and other organisations crossing linguistic and geographic boundaries; speedier business transactions; and lower costs – e-commerce will greatly reduce traditional business transactions costs, the length of the value chain. ICT gives operators a better understanding of consumer needs because of research interaction and data mining, thus allowing differentiation and customisation according to personal preferences. ICT is increasing the efficiency, productivity and competitiveness of firms globally .

Despite the proliferation of new technology, the tourism industry is sometimes reluctant to adopt new methods and tools. The surveys support this. This is also consistent with claims that there is limited awareness among tourism operators of government funding schemes that promote technology uptake. The Commercialising Emerging Technologies (COMET) Program provides support for early stage business planning, market research and training. Tourism businesses can access COMET for funding assistance however there is a poor uptake by tourism businesses (Australian Government 2006). It is unclear whether or not operators in the two regions are aware of such schemes.

The success of tourism enterprises in the two regions will hinge on their efforts to add value to products and services through the use of technology producing competitive advantage. The new technologies with sophisticated database management systems provide the tools to respond to individual preferences and stimulate tourism purchases.

Cooperation and partnerships

A key aim of the workshops was to provide industry operators with information regarding the benefits of networking and partnerships at the destination level. Respondents were

believed networking and collaboration among tourism stakeholders at their destination would increase after attending the workshop. The workshop appeared to be effective in increasing awareness of the benefits of networks, cooperation and partnerships at the destination level in the Capital Country with an overall mean score of 3.2. Some suppliers indicated their intention to join a local industry tourism committee after attending the workshop. Industry association membership and cooperation with complementary suppliers and the creation of an internet based industry group were other potential avenues for collaboration suggested by workshop participants. The motives for forming such relationships were numerous and included developing strategies to increase business, cooperative advertising to reduce overall costs, familiarization with the various products and experiences on offer within the region, and pooling expertise, experience and knowledge to apply for government funding.

Respondents from the Snowy Region rated the level of cooperation and collaboration among industry stakeholders at the destination prior to attending the workshop even lower than Capital Country respondents with an overall mean score of 2.3. The expected increase in cooperation and partnerships following the workshops was also expected to be minimal with a mean score of 2.0. The perceived lack of cooperation among tourism suppliers within the region was further supported by the statements made by some Snowy region respondents (Table 3). When asked which stakeholders respondents were most likely to cooperate with in the post workshop period for joint advertising and promotional activities, respondents stated accommodation providers (85%), attractions (74%), RTOs (68%), local government (60%) and restaurants (52%).

It is difficult to exaggerate the importance of cooperation and collaboration among tourism organizations in today's industry. Associated with the increasing competitiveness of the industry is a realisation of the benefits of forming strategic alliances for such purposes as destination marketing and product development. Tourism providers will more easily and more often form strategic partnerships, offering complementary products. Public and private sector partnerships as well as mechanisms such as joint venture promotion to limit risk will be further developed as the tourism industry attempts to attract additional private sector capital. Firms that are not cognizant of 'co-opetition' and strategic alliances will be at a competitive disadvantage (Singh 1999).

There is likely to be an increasing

Table 3 : Cooperation and partnerships

Capital Country	Snowy Mountains Region
"There is a complete lack of under-standing of the importance of cooperation and partnerships among businesses in this region."	"Cooperation among businesses in this area is very poor. We need to get together to develop packages. There has been discussion about it but nothing has happened yet."
"Cooperation and partnerships are basically non-existent in our area. I hope it will improve in the near future."	"I don't think cooperation among tourism stakeholders will increase much as not enough of our tourism businesses attended the workshop."
"We try very hard to cooperate with other businesses in the area – the more you share the better."	"Networking among tourism stakeholders is slowly increasing but many operators are still too selfish and many of the locals are not friendly to tourists"
	"Tourism New South Wales should run a campaign to remind everyone that tourism is everybody's business not just those that directly deal with tourist".
	"The workshop awakened a few people and

Source: Author's survey of tourism operators in Capital Country and Snowy region, July, 2006

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likely that tourism enterprises all along the value chain that implement best management will achieve better: economies of scale; market intelligence and market feedback; quality control; and cooperation along the value chain. Tourism operators in both regions may be able to capitalize on the available opportunities here.

Usefulness of the workshop toolkit

A key component of the destination development workshops was the distribution of a Toolkit which was created and distributed by the DMO and which included key tourism and management information that would enable tourism industry operators to make more informed marketing and management decisions. Several strengths and weaknesses of the Workshop Toolkit were noted by some participants. The comprehensive information provided and the benefits of the kit as a reinforcement tool were two key strengths. However the main criticism of the toolkit was that it was most suited to new tourism operators who were just starting out in the industry and the data was thought to be outdated (See Table 4).

An important issue raised by the respondents is the need for better statistics as a basis for more informed decision making. The Tourism White Paper (Australian Government 2004) identified a number of information gaps. While the Tourism Forecasting

Table 4 : Usefulness of the workshop toolkit

Capital Country	Snowy Mountain Region
"The toolkit is a great concept for operators that are new to the industry and think that tourism is easy to succeed in".	"It isn't enough to provide information in a tool kit. You must get people to under-stand the importance of the information. We need more meetings which focus on the skills in the toolkit as well as more current statistics and an explanation of what they mean for the future of tourism in the area"
"The toolkit information was very good. A lot of contacts were given. It awakened a few people and showed us how fragmented we are. Maybe we need a leader to drag us all back together to revisit it. The workshop brought us together more than what we were".	"We are hoping to implement the tool kit in the near future, just haven't had time to read it"
	"The concept of a tool kit was a good idea but

Source: Author's survey of tourism operators in Capital Country and Snowy region, July, 2006

in its infancy. As it has only been used in a limited capacity in tourism destinations there is no compiled systematic research available on the activities, or new product developments, of international competitor destinations.

Substantial resources have been allocated to address these, including the formation of Tourism Research Australia and the provision of funding to improve the availability and usage of industry information and statistics. Nonetheless, there is still room for improvement, particularly in minimising the accommodation investment information gap which was emphasized by several respondents in the two regions. Indeed Australia's regional tourism industry would benefit from collecting intelligence about international competitor destinations on many fronts, in order to compete more effectively with our international competitors. Benchmarking would continually and systematically search for best practices. These can then be utilised by Australia, leading to superior performance (Australian Government 2006).

Conclusion

The workshops held by Tourism New South Wales appear to have been an effective tool for bringing together tourism operators within the campaign

outlined by Buhalis (2000) there were several common areas where tourism suppliers across the two regions perceived room for improvement. Whilst operators believed that tourists to their region were generally satisfied they suggested satisfaction could be enhanced if greater attention was given to other goals such as host-guest interaction, infrastructure development and a greater sense of community and cooperation.

Numerous writers have suggested that marketing effectiveness lies in a positioning strategy based on either a unique product offering/experience or a clearly superior product offering/experience. This is recognized by Tourism New South Wales in their use of the catch phrase for regional New South Wales 'There's no place like it'. However some of the suppliers within the two regions studied were not convinced there were sufficient experiences on offer within their regions to attract visitors and to generate increased length of stay. In particular a lack of sufficient infrastructure to capture new and additional markets was highlighted as limiting the tourism potential of the destinations.

One of the brand attributes emphasized by Tourism New South Wales for the regional campaign zones is 'local community'. However a common perception among operators who attended the workshops was that the customer service and friendliness of locals towards tourists was lacking at their destination. This is partly because tourism suppliers believe that local residents not directly involved in the tourism industry do not recognize the value of tourism to their community. Similarly there was a perceived lack of 'community' when it came to cooperation and partnerships among industry operators. While tourism suppliers were generally supportive of the idea of cooperation, many lacked the knowledge or skills required to forge such relationships

within their destination region.

The findings appear to support the Buhalis contention that regional tourism organizations should be responsible for guiding destination marketing activities in such regions. As a majority of tourism and hospitality firms are small and independently owned and operated they lack the skills, experience and expertise of a professional marketing organization. A DMO has an important role to play in bringing tourism suppliers and other stakeholders at the destination together in the name of tourism.

The workshops are a positive step toward creating a more integrated approach to destination marketing among destination stakeholders. Government tourism organizations and regional tourism organizations play an important role in this process. Local suppliers appear to rely on such organisations for guidance and leadership in the development of destination marketing strategies. DMOs are also regarded as integral to the development of cooperative partnerships. The research indicates that Tourism NSW needs to work more closely with the sub-regions to develop destination-specific marketing strategies, including the development of cooperative marketing partnerships among private operators and between local/state government tourism agencies and the private sector. Ideally, a tourism consultant should be employed to work with operators in these regions to provide guidance in the formation of cooperative relationships. The tourism operators, particularly in Snowy region, need more professional assistance and guidance with regard to formulating a more focused destination marketing strategy and developing cooperative industry partnerships. A destination attribute audit could also be undertaken by consultants in those regions lacking a coherent and effective destination marketing authority. Finally, it should be noted that the findings of this study were limited to the views held by tourism industry operators and that a more holistic picture regarding support provided to the industry by DMOs would emerge if government authorities were also interviewed.

While the context of study was a particular regional area, the results have

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