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CHAPTER FOURTEEN MARKETING FOR TOURISM

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Introduction

The Caribbean economies are very dependent on Tourism and the financial spin-off from this dynamic business sector makes a significant contribution to the health of the island nations. As noted by the Director of International Labour Organization,ⁱ “The economic importance of the tourism sector is higher for the Caribbean than for any other region in the world. In 1995, the World Travel and Tourism Council (WTTC) estimated that in the Caribbean some 25 per cent of employees in all industries are working directly or indirectly for the tourism sector which is double or more than in most other tourist destinations.”

Yet while history has favoured the region, more recent events and competitive issues now challenge managers of the tourism industry and it has become difficult to maintain the leading position the Caribbean once had in the global tourist economy. New and competitive destinations are opening up in Asia and the Pacific regions that offer low priced, good value experiences. Consequently the Caribbean will need to rely more heavily on marketing practices and devise alternative strategies to the traditional mass tourism promotion that emphasized quantity over quality. It is particularly important “in a region characterized by relatively high travel costs and room rates, high labor and utility costs, and low profits and income multipliers.”ⁱⁱ

This chapter identifies the role that marketing plays in the tourism industry. It identifies a number of major issues students will find important if not critical in developing effective tourism strategies including:

1. The need to identify specific targets and customer groups,
2. More reliance on marketing research in developing customer profiles,
3. The magnitude and importance of tourism in the region,
4. The competitive nature of the industry,
5. The importance of sustainability in tourism, and
6. the future for the industry, particularly with an emphasis on marketing strategy rather than promotional tactics and pricing.

Tourism and Marketing

Tourism is unique among industries and the application of marketing principles to the industry need to address at least seven important sub-sectors or dimensions; travel, transportation, accommodation, food-service, tour operators, attractions and merchandisers, Figure 14.1. Each of these requires the employment of marketing functions, in whole or in part, which are different yet they must be coordinated and integrated one with the other. Travel services, for example, are used by customers to reach a selected destination where they are fed, sheltered then entertained by a variety of enterprises and related services. Thus the marketing activity needs be multifaceted and directed toward a number of customer targets. The remarkable aspect about cruise ship tours, such as those offered by Royal Caribbean is that all four sectors are contained in the package, and many packages also includes the travel from ones home to the embarkation point.

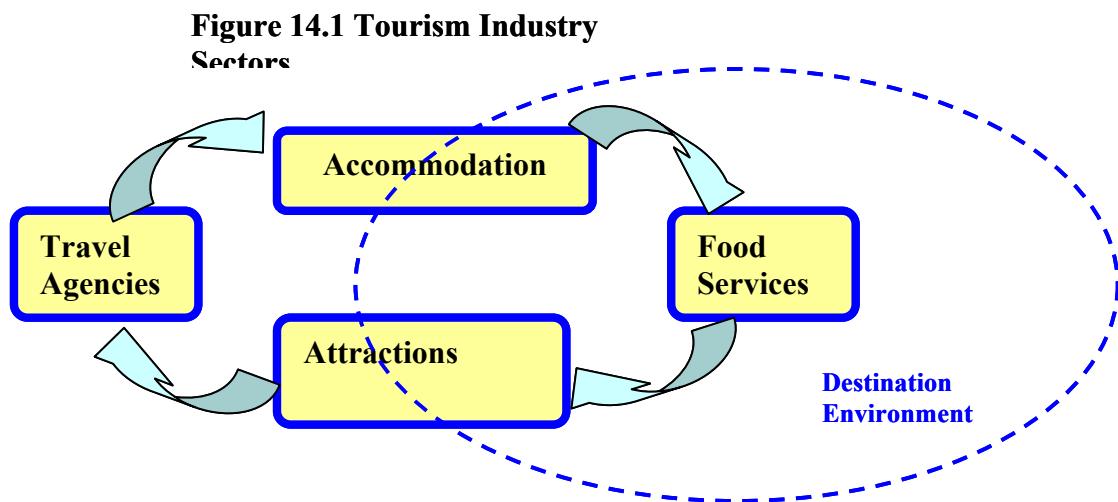
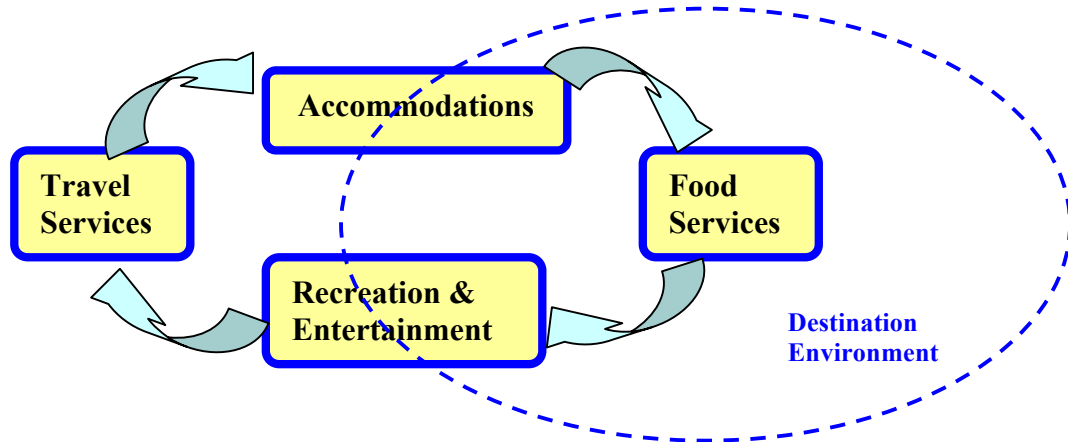


Figure 14.1 Tourism Sectors



A fifth dimension in tourism is referred to as the destination environment. It usually resides in a pleasant, natural setting and typically is characterized by natural beauty or as in the three Ss, sun, sand and surf. However the format or setting is now past the maturity stage of the product life cycle and competes with hundreds of sites world-wide in the beta economy sector where price and utility are the principle determinants. It resides in the era of mass marketing which no longer ensures success.

The principle advocacy of marketing is to create value. The tourism market is not a single mass group of holiday revelers looking for a fun haven but rather is comprised of hundreds of different individuals each with their own particular objective and need-satisfaction goal. Each of these has their own perception of their needs and wants and each acknowledge some value in the product/service being offered. The strategy that each dimension in the tourism industry must apply is that of creating value in the perception of customers about their particular offering.

Defining the Customer

Tourists are customers. They have generally been treated in the literature and the industry as a collective under the caption of “tourists.” But in fact it is critical to marketing success that these individuals be recognized as unique, individual customers.

A tourist is typically characterized as a mobile, amorphous individual with disposable cash motivated by a need to have as good time holiday. In reality they must be defined in terms that reflect their peculiar characteristics and psych-socio profiles. The more advanced countries carry out extensive studies to better understand the customer profile and the product being offered by the region. For example the South Australia, Victoria and Queensland state tourism authorities in conjunction with Griffith University, Victoria University and South Australia University completed a study of the wine destination-customer profile in December 2003ⁱⁱⁱ.

The study investigated the important role food and wine play in attracting tourists to a destination. This type of research provides much needed information about what constitutes a successful food and wine region and allows important insights into what motivates tourists to visit such regions and how other lifestyle products can enhance the customer's experience of the region. The important issue is that research produces vital information that can further develop and market food and wine regions. The Australian project involved interviews, focus groups and surveys to fully understand the key dimensions of a food and wine region, as well as the underlying motives for tourists to visit.

Marketing research is extremely important to the creation of strategies for tourism marketing. All strategies begin with an understanding of the customer that then leads to relating, perhaps modifying the product as to the destination environment, the type of food service, the design of accommodations and even the travel and destination mix, to customer profiles. It is only after this comprehension has been internalized that the marketer can initiate the promotions strategies, the distribution methods and the price as based on what the market will bear.

WHAT IS TOURISM?

Tourism is a complex phenomenon, which is difficult to describe in a few words. Most people have a spontaneous and often simplistic perception of the word tourism. It is mainly thought of as people going on a holiday, visiting a particular place for sight-seeing and visiting friends and relatives. They may spend their time sunbathing, relaxing, engaging in various sports and going on a tour. In other words, people traveling away

from their homes for recreational purposes. But what about business travelers, students on a study trip, sports teams going on a tournament in another city or country and people going on pilgrimages? Considering the subject further it is clear that these people are tourists too. Therefore when attempting to define tourism it is necessary to consider the various groups that participate in and are affected by the tourism industry.

No one definition of tourism has gained universal acceptance and many tourism definitions have been put forward over the years. There are definitions that can be applied to any situation while others may satisfy specific purposes. For the purpose of this chapter a general definition will be offered. The World Tourism Organization's (WTO, 2002) officially accepted definition takes the concept of tourism beyond the above-mentioned stereotypical image of holidaymaking:

“Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes.”

This definition takes the traveler, the destination and travel purposes into consideration. However, for a more comprehensive definition, the stakeholders who play an important role in tourism need to be incorporated. A more comprehensive one is Weaver and Lawton's (2002:3) definition of tourism which incorporates all the aforementioned issues as well as travel to and from destinations.

“Tourism is the sum of the phenomena and relationships arising from the interaction among tourists, the tourism industry, host governments, host communities, origin governments, universities, community colleges and non-governmental organizations, in the process of attracting, transporting, hosting and managing these tourists and other visitors.”

An extensive list of stakeholders in addition to travel to and from destinations is considered in this definition. The process of attracting tourists and visitors is also taken into consideration, which is the core theme of this chapter. On the other hand a definition

of the twentieth century tourist that highlights the fact that no matter how much effort is put into attracting the tourist, the tourist will complain if things are not the way he/she is accustomed to: `someone who travels to see something different, and then complains when he finds things are not the same` (Holloway, 1998:3).

The Importance Of Tourism

Tourism is an ancient phenomenon that was evident in classical Egypt, Greece and Rome. “The invention of money by the Sumerians (Babylonians) and the development of trade beginning about 4000 B.C. mark the start of the modern era of travel” (Goeldner & Ritchie, 2003:42). In the pre-modern and early-modern stages tourism was mainly accessible to the elite. Motivations to travel were related to religion, health and education. However, it was only after World War II that tourism started to spread and people started travelling for leisure.

The advance of aircraft technology led to a viable commercial aviation industry and in 1958 the Boeing 707 jet was introduced. The direct relationship between advances in transportation and growth in the tourism industry can be clearly traced, as the car and jet aircraft in particular have made travel accessible to an ever-growing number of people.

Travel and Transport

Transportation provides the lifeblood of the tourism industry and its standards of efficiency, comfort and safety highly affect the standard of the holiday experience.



The 555-seat A380 from Airbus is the biggest and most advanced passenger aircraft ever built. It was introduced to the world for the first time in January, 2005 and is the first double-decker passenger jet built (www.airbus.com). According to Airbus it will be able to carry up to 35 per cent more passengers and lowering seat costs by up to 20 per cent.

Source: <http://www.airbus.com/>

This will no doubt affect airports of origin and destination since gates may not have the capacity to accommodate the full passenger load of the A380. To date, Airbus has received 154 orders and commitments from 15 customers with Emirates being the biggest buyer, with an order of 18 airplanes. This will no doubt transform air travel. On April 27, 2005 the A380 took off on a four-hour successful test flight from its production site in Toulouse, southern France.

The new jets of the rival Boeing the 777-200LR (Longer Range) and the 777-300ER (Extended Range) are the longest range commercial airplanes in the world (www.boeing.com). These airplanes have been developed to offer airlines additional flexibility in serving the nonstop routes that passengers demand.



Source: www.boeing.com

The 200LR will fly more than 17,000 kilometers, with a capacity of 301 passengers, for nonstop trips such as Singapore to New York, therefore eliminating transit stopovers. On the other hand the 300ER carries 365 passengers up to 14,594 kilometers. The 777's have a more efficient engine and a lighter structure, which makes the aircrafts fuel efficient. Factory rollout of the first of the two models took place in November 14, 2002.

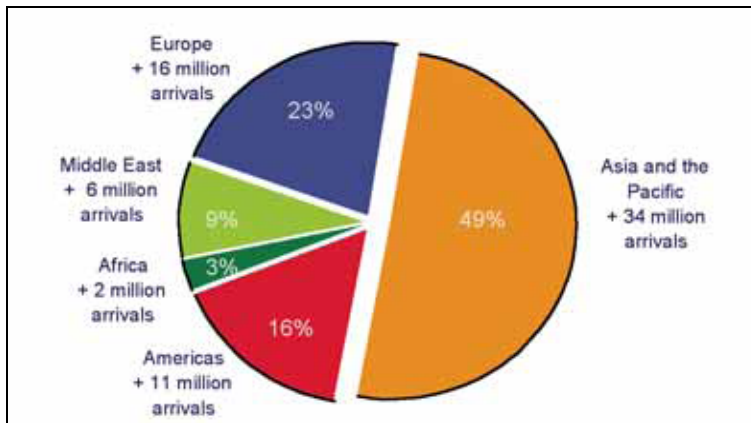
THE WORLD'S LEADING INDUSTRY

Tourism has grown from a minor activity into an economic giant. It ranks as the largest industry in the world in terms of employment (one out of every 16 employees worldwide) and ranks in the top two or three industries in almost every country on nearly every measure (Mowlana & Smith, 1993). Consequently the travel and tourism industry has become a major contributor to the gross national product of many countries. Due to attractive economic outcomes, many developing countries have embraced tourism as a passport to economic development and modernisation.

According to WTO (2005) international tourist arrivals reached an all-time record of 760 million in 2004. This is a 10% increase over 2003. The WTO reports (see figure 1) that growth was widespread in all regions, but was primarily strong in Asia and the

Pacific and in the Middle East. Growth was also registered in the Americas, while Africa and Europe interestingly performed below the world average, but still substantially improved their results of previous years.

Figure 1: Growth of International Tourist Arrivals



Source: World Tourism Organisation (2005)

The experiences of the past decade have proven that people continue to travel even in less prosperous economic times. According to WTO's (2001) long-term forecast, international tourist arrivals will top one billion by 2010 and reach 1.56 billion by 2020. It is clear that the tourism industry is global; it is big business and will continue to grow. As a result of the tourism industry's economic potential, marketing tourist destinations and its products has become a widely recognised practice for both public and private sector organisations. (Riege & Perry, 2000). This is often times done in an effort to satisfy Holloway's 20th century tourist, which is often times a difficult task.

The World's Leading Tourism Destinations

In recent years, practically every country throughout the world has taken steps to increase its number of visitors. New opportunities for countries and individual tourism

organisations to promote tourism have developed through the decrease in cost of air travel and the continued development of technological resources such as the Internet.

Over 35 per cent of worldwide international tourist arrivals are concentrated in the top five tourism destinations, while the ranking of the top 25 destinations covers almost two-thirds of world tourist arrivals. The top five destinations (see table 1) have somewhat maintained their place in world tourism. France firmly leads the ranking of the most visited destination with 77 million international tourist arrivals and a share of 11 per cent of worldwide arrivals in 2002. Spain strengthened its second place with a 3 per cent growth in tourist arrivals to the destination while arrivals to the United States dropped 7 per cent for the second year in a row. Italy, occupying the 4th position, had almost 40 million arrivals, whereas China, ranked 5th, confirmed its importance as a growing destination and achieved the fastest growth among the top 5 in 2002.

**Table 1: The World's Top Tourism Destinations
(international tourist arrivals)**

2002 rank	Country	Arrivals (million)		Percent change 2001/2002	2002 market share
		2001	2002		
1.	France	76.5	77.0	2.4%	11.0%
2.	Spain	49.5	51.7	3.3	7.4
3.	United States	45.5	41.9	-6.7	6.0
4.	Italy	39.1	39.8	0.6	5.7
5.	China	33.2	36.8	11.0	5.2
6.	United Kingdom	22.8	24.2	5.9	3.4
7.	Canada	19.7	20.1	1.9	2.9
8.	Mexico	19.8	19.7	-0.7	2.8
9.	Austria	18.2	18.6	2.4	2.6
10.	Germany	17.9	18.0	0.6	2.6

Source: World Tourism Organization (2005)

China is expected to become the fourth fastest-growing tourism economy and interest groups such as the World Tourism and Travel Council (WTTC) argue that China has the potential to be one of the world's great tourism economies. Over the next 10 years China will achieve an annualised real growth rate of 10.4% in travel and tourism demand.

The top table changes if the destinations are ranked according to the number of international arrivals relative to the size of the population (see table 2). In doing this a number of smaller destinations specialised in tourism leads the list. Andorra is the evident leader with almost 50 arrivals for each resident while Macao (China) and the British Virgin Islands rank second and third with over 10 arrivals for every resident. Among the first 25, the table furthermore includes a big number of small island states in the Caribbean and the Pacific.

World's Top Tourism Destinations (relative to population)

Rank	Arrivals per 100 of population ¹	International Tourist Arrivals (million)			Change (%)		Market share 2002 ²	Population 2002 (1000)		
		Series	2000	2001	2002 ²	01/00			02/01	
World	11		687	684	703	-0.5	2.7	100	6,228,395	
1	Andorra	4,953	TF	2.9	3.5	3.4	19.2	-3.6	0.5	68
2	Macao (China)	1,422	TF	5.2	5.8	6.6	12.4	12.4	0.9	462
3	British Virgin Islands	1,338	TF	0.3	0.3	0.3	5.2	-3.7	0.0	21
4	Aruba	913	TF	0.7	0.7	0.6	-4.1	-7.0	0.1	70
5	Turks and Caicos Islands	827	TF	0.2	0.2	0.2	8.6	-6.3	0.0	19
6	Monaco	822	THS	0.3	0.3	0.3	-10.1	-2.6	0.0	32
7	Cayman Islands	743	TF	0.4	0.3	0.3	-5.6	-9.3	0.0	41
8	Guam	659	TF	1.3	1.2	1.1	-9.9	-8.7	0.2	161
9	Northern Mariana Islands	603	TF	0.5	0.4	0.5	-15.3	6.4	0.1	77
10	Bahamas	525	TF	1.5	1.5	..	-0.4			295
11	Bahrain	482	TF	2.4	2.8	3.2	15.2	13.6	0.5	656
12	United States Virgin Islands	448	TF	0.6	0.6	0.6	-2.5	-6.6	0.1	124
13	Bermuda	444	TF	0.3	0.3	0.3	-16.3	2.1	0.0	64
14	Antigua and Barbuda	356	TF	0.2				67
15	Anguilla	353	TF	0.0	0.0	0.0	9.5	-8.3	0.0	12
16	Cook Islands	351	TF	0.1	0.1	0.1	2.2	-2.1	0.0	21
17	Cyprus	315	TF	2.7	2.7	2.4	0.4	-10.3	0.3	767
18	Palau	304	TF	0.1	0.1	0.1	-6.9	9.3	0.0	19
19	Brunei Darussalam	293	VF	1.0				351
20	Malta	285	TF	1.2	1.2	1.1	-2.9	-3.9	0.2	398
21	Austria	228	TCE	18.0	18.2	18.6	1.1	2.4	2.6	8,170
22	Hong Kong (China)	227	VF	13.1	13.7	16.6	5.1	20.7	2.4	7,303
23	United Arab Emirates	223	THS	3.9	4.1	5.4	5.8	31.7	0.8	2,446
24	Luxembourg	195	TCE	0.9	0.8	0.9	-2.6	5.6	0.1	449
25	Barbados	180	TF	0.5	0.5	0.5	-6.9	-1.8	0.1	276

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO September 2003)

Terrorism, war, diseases and recession has kept potential travellers close to home since 2001 and halted the steady growth in global travel. International tourism is now recovering from this stagnant growth and South East Asia is recovering from the December 2004 Tsunami. It is clear that people are getting more accustomed to living in an unsafe world. Although there are continuing concerns over safety and security, tourism demand has recovered more quickly after the recent natural disasters and terrorist attacks. Traveller's attitudes to health risks such as SARS are similar to the attitudes to safety and security.

SUSTAINABLE TOURISM

It is clear that the expansion of the international tourism industry, as any economic development tool, holds a number of social and environmental consequences.

Stakeholders in the industry are aware of the need to focus not only on the economic benefits but also on the environmental and socio-cultural issues surrounding the tourism industry. Consequently the buzzword in today's tourism industry is sustainability. Some do however claim that many businesses are getting into sustainability in order to retain or increase their market share, without being committed to the principles of sustainability (Wheeller, 1994).

The general literature on sustainable tourism is vast, and it will be sufficient here to mention some of the basic issues pertaining to the topic. The term sustainable tourism became popular after the release of the Brundtland Report that came out of the 1992 Earth Summit held in Rio. Despite the popularity of the concept sustainable tourism, there is a lack of practices that can be implemented. This is due to the fact that there is no universally accepted definition of the term. Whenever the subject of sustainable tourism is mentioned most people think environment. Sustainable tourism development is much more than that; it is "based on the realities that unrestricted growth is not sustainable and that there are limits to the numbers of tourists that can be accommodated in one place at a time, limits on the capacity of natural sites and attractions and limits to the patience of host communities" (Garraway, 2004). Sustainable tourism meets the needs of the present tourists and host regions, without compromising the ability of future generations to meet their own needs.

It is a difficult challenge for tourism destinations in all parts of the world to determine how to bring in tourists and its associated economic benefits without destroying the very product that the tourists have come to experience and without negatively affecting the host community. This is specifically challenging to developing countries as well as to small islands with fragile and vulnerable resources. Mass tourism has traditionally been seen as the opposite of sustainable tourism. In recent years the concept of sustainable

tourism has been introduced to mass tourism and both policy makers and stakeholders in the tourism industry are taking steps towards sustainability.

Finally, in order to truly speak of sustainability, local communities must also benefit directly or indirectly from the tourism product. The most important aspect of sustainable tourism is the protection of the host community. For tourism to be sustainable they must be actively involved in tourism from the planning stage, be part of the development of tourism and ideally control the local tourism industry (Swarbrooke, 1999). It is therefore important that decisions are not taken solely by the local elite, either elected or self appointed. After all as the host community are the people who live within a tourist destination and are thus part of the tourism product.

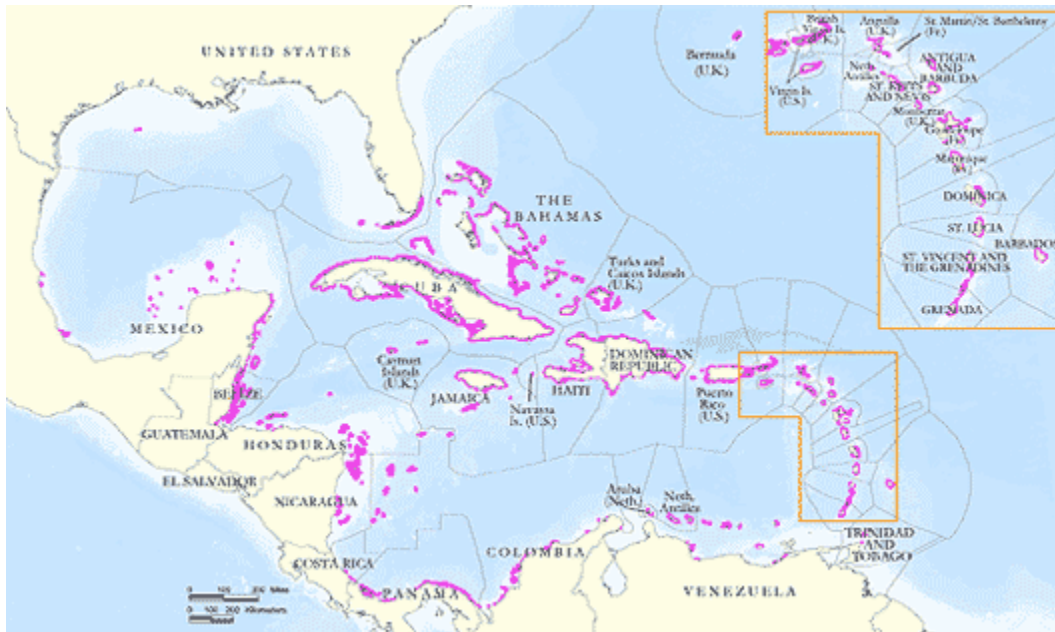
Inevitably any form of [tourism] development can only be judged sustainable or unsustainable after a long period of operation, when it can be ascertained if the demands of the activity have not prejudiced the needs of what were future generations when the development began” (Butler, 1998:31).

PROFILE OF THE CARIBBEAN

The Caribbean region with 35 countries and territories is the most complex and varied of the Regional Seas (see map). The region comprises mainly small islands, politically and socially diverse, under the jurisdiction of the UK, France, USA and the Netherlands. These Islands have fragile ecosystems and equally fragile economies that are heavily dependant on tourism and generally declining agriculture.

The sugar industry, once the mainstay of the Caribbean economies, has faded. This is the result of the difficulty for the region to compete with international markets. Both tourism and agriculture are very susceptible to international fluctuations in price and demand. Over the last three decades, tourism has surpassed fishing as the most important economic activity for many coastal localities in the region. (Burke & Maidens, 2004). The benefits of tourism impact on the entire economy, and tourism representing more than one quarter of the region’s total export receipts (UNDP, 2004) is central to the overall

economic and social development of the Caribbean. Tourism is particularly important for the island states, where the growing numbers of tourists often exceed the resident population. Recent advances in the areas of information technology and telecommunications now mean that the Caribbean tourism sector is competing on an international level. The Caribbean economies has always been driven by external forces, and in most states it is still so today with tourism (McElroy, 2000).



Map of the Caribbean Region

Source: World Resources Institute (2004) www.wri.org

Tourism In The Caribbean

The Caribbean tourism sector was seen as potentially important for the region's economic growth as early as the 1940s and in the 1960s the hotel chains and tour operators began to show interest in the Caribbean (Holder, 1993). Tourism was embraced by many Caribbean islands as the engine for economic growth after periods of decline in a falling sugar industry.

Most islands in the region have very few natural resources and little in the way of diversified economies. Consequently tourism continues to receive increased attention as an important sector of the Caribbean's economy. As noted earlier there is no other region in the World that is as dependent on tourism for economic growth as the Caribbean.

The Caribbean's Place In World Tourism

In 2004 the Caribbean received a total of 21.8 million stay-over visitors (visitors staying at least 24 hours). The figure represents an increase over the previous year. The CTO (2005) reports that Cuba and the Dominican Republic account for nearly a quarter of all tourists to the Caribbean; their robust performances have clearly boosted the regional average. The region's major tourism markets are the United States, Europe and Canada.

Additionally a 13 per cent increase in cruise passenger arrivals in the same year was recorded at 20.5 million while travellers generated US\$ 21 billion in revenue for the Caribbean in 2003 (CTO News, 2005). There are however major internal variations. Trinidad & Tobago has relatively weak tourism sector due to its economy being sustained by oil and industrialisation while poverty and instability is the main reason for Haiti's weak tourism sector (Weaver & Lawton, 2002). Cuba is developing its potential and climbing the ladder of the world's top tourism destinations. The development of Cuba's tourism industry has been hindered by restrictions imposed by the US government.

Governments in the Caribbean have come to recognise tourism's actual and potential contribution to their economies and are giving the sector a higher political priority than before. As a result, economic policy objectives increasingly centre on tourism's ability to generate employment, earn foreign exchange and contribute significantly to government revenue. Every country in the Caribbean will need to have a detailed plan for the development and the marketing of its tourist market in order to capitalise on this expanding tourism interest in the region.

Tourist (stop-over) and Cruise Arrivals in 2003							
Destination (Stay – Over)	Period	Tourist Arrivals	% Change 2003/02	Destination (Cruise)	Period	2003	% Change 2003/02
Anguilla	Jan-Dec	46,915	7.1	<u>Anguilla</u>	-	-	-
Antigua & Barbuda*	Jan-Oct	182,423	12.8	<u>Antigua & Barbuda</u>	Jan-Jul	220,308	2.6
Aruba	Jan-Dec	641,906	-0.1	<u>Aruba</u>	Jan-Nov	470,049	-8.3
Bahamas*	Jan-Dec	1,428,599	1.8	<u>Bahamas</u>	Jan-Dec	2,970,174	6.0
Barbados	Jan-Nov	474,248	5.6	<u>Barbados</u>	Jan-Nov	467,848	4.1
Belize	Jan-Sep	171,709	11.9	Belize	Jan-Nov	482,023	82.8
Bermuda	Jan-Sep	213,297	-7.1	Bermuda	Jan-Sep	192,648	15.0
Bonaire	Jan-Dec	64,176	23.2	Bonaire	-	-	-
British Virgin Islands ^P	Jan-Jul	184,777	-4.3	British Virgin Islands ^P	Jan-Jul	178,699	57.3
Cancun (Mexico) **	Jan-Oct	1,768,759	5.3	Cancun (Mexico)	-	-	-
Cayman Islands	Jan-Dec	293,515	-3.1	Cayman Islands	Jan-Dec	1,818,979	15.5
Cozumel (Mexico)	Jan-Feb	62,674	37.5	Cozumel (Mexico)	Jan Only	277,516	38.4
Cuba	Jan-Nov	1,690,799	13.1	Cuba	-	-	-
Curacao	Jan-Nov	200,819	1.3	Curacao	Jan-Nov	246,976	-11.8
Dominica	Jan-Nov	66,252	8.9	Dominica	Jan-Jun	96,105	5.4
Dominican Republic*	Jan-Oct	2,677,082	19.1	Dominican Republic	Jan-May	218,993	54.3
Grenada	Jan-Oct	117,758	7.6	Grenada	Jan-Oct	95,063	-4.4
Guyana	Jan-Nov	87,256	-6.4	Guyana	-	-	-
Jamaica	Jan-Dec	1,350,284	6.6	Jamaica	Jan-Dec	1,132,596	30.9
Martinique	Jan-Nov	405,128	-0.6	Martinique	Jan-Dec	286,218	38.0
Montserrat	Jan-Oct	5,966	-13.4	Montserrat	-	-	-
Puerto Rico **	Jan-Sep	1,013,168	3.7	Puerto Rico	Jan-Oct	938,918	-1.8
Saba	Jan-Sep	7,808	-2.3	Saba	-	-	-
St Lucia	Jan-Dec	276,948	9.3	St Lucia	Jan-Dec	393,262	1.6
St Maarten*	Jan-Dec	427,587	12.3	St Maarten	Jan-Sep	785,706	6.2
St. Vincent & G'dines	Jan-May	28,137	-7.2	St. Vincent & G'dines	Jan-May	34,317	-34.1
Trinidad and Tobago	Jan-Sep	303,788	4.9	Trinidad and Tobago	Jan-Apr	33,477	-18.2
Turks and Caicos Is.	Jan-Mar	47,198	8.1	Turks and Caicos Is.	-	-	-
US Virgin Islands	Jan-Dec	618,703	3.5	US Virgin Islands	Jan-Dec	1,773,948	2.0

* Non-Resident Air Arrivals **Non-Resident Hotel registrations only

^P Preliminary figures

N.B: Figures are subject to revision by reporting countries

SOURCE - Data supplied by member countries and available as at November 22, 2012

- No Cruise Figures are Reported
n.a. Figures not available

Source: CTO (2004)

THE CARIBBEAN TOURISM PRODUCT

Islands and small states depend heavily on tourism since many islands generally are ready-made tourism destinations. This is clearly related to holidays being thought of as a means to escape and 'get away from it all' in the remoteness of small tropical islands. However this picture is often times misleading in today's global societies. Many factors have combined to raise the Caribbean into the position of an increasingly important destination region.

The dawn of the tour operators in 1955 led tourism into the 3S (i.e. sun, sea and sand) model in the Mediterranean. The Caribbean has since then become an alternative to the Mediterranean, providing a similar product. As a mass-market tourist destination the primary attraction of the Caribbean is the traditional 3S tourism. The all-inclusive holiday, created by Club Med appeared in 1950, is very typical of the Caribbean.

Main tourism products

The Caribbean has been successful as a tourist destination and attracted a large number of visitors mainly due to climate and physical characteristics. Other reasons for the success are security issues; accessibility; image and marketing just to name a few. In other words, those destinations offering a safe and secure 3S environment is a great advantage over the less secure destinations. On the other hand changing consumer preferences in the major international tourism markets are particularly important, as is the economic growth within the less developed world.

Although a high number of tourist arrivals in the Caribbean is a direct result of its 3S product, the Caribbean Tourism Organization (CTO) has taken the changing consumer preferences into consideration and is now moving towards an emphasis on specialised holiday products. These products include niches such as diving, trekking, wildlife and sports tourism. This reposition is an attempt to move away from the regions 3S image. On the other hand, ecotourism has been adopted as an economic development strategy by the Cuban government. An indication of the move away from standardised holiday

packages to more tailor-made holidays is the soft adventure products and excursions that increasingly are being added to the traditional beach holiday package offered by tour operators. New emphasis is also being placed on the development of eco-tourism especially in Guyana, Belize and Suriname as well as Dominica, the Dominican Republic, Cuba, Trinidad and Tobago and St. Lucia.

Cruise tourism

With traditional 3S tourism tourists stay on the beach watching the sea. This is changing and tourist now makes the sea itself the destination through holidays focusing on diving, whale watching, swimming with dolphins, sailing and cruising.

The Caribbean is the most popular area in the world for the operation of cruise ships. Its convenient proximity to North America makes it an easily accessible 'pleasure periphery' for that market. Miami is the major hub from which most ships into the region operate. Many Caribbean islands now receive significantly more cruises than they do stopover tourists. Since shopping facilities on board ships is an important source of revenue for the cruise lines the economic impact of the cruise ships is an increasing concern. Since stay-over tourists are far more economically favourable to Caribbean countries than cruise tourists, the shift away from the former towards the latter represents a startling trend for the region. Over the years 3S and cruise tourism has branched out to include heritage, cultural and nature attractions including underground caves, marine parks, historic sites, festivals, golf courses and sports.

Sports tourism

The region has been popular for sports such as diving, sailing and windsurfing. However, the unsustainable use of the environment due to these activities has added to the pressures on the coastal environment. Overuse of the sea has resulted in pollution by fuel, disturbance to wildlife and destruction of corals. Golf is another popular sport in the Caribbean. In recent years golf tourism has increased in popularity and the number of golf courses has grown rapidly. Moreover, the Caribbean invests in other sports events

such as the Johnnie Walker World Golf Championship, Aruba Hi-Winds Pro-Am Windsurfing Championships, Cockspur Gold Cup Horse Racing event in Barbados, Rolex Cup regatta in St. Thomas and the Cayman Islands Super Fish Bowl just to name a few. Finally, cricket is currently being invested heavily in, with the Cricket World Cup coming up in 2007. With this event the region is hoping to stimulate the local populations of the region to get involved in tourism and hopefully benefit from it.

Caribbean tourism market trends

Economic issues such as a weaker U.S. dollar compared with the Euro and the Canadian dollar has boosted the tourism growth in the Caribbean. The CTO argues "since most Caribbean products are priced in US dollars, this trend has made the Caribbean significantly more affordable for visitors from Canada, the United Kingdom and continental Europe". At the same time, since it has also become more expensive for Americans to vacation in these markets, the Caribbean becomes a more attractive option" (CTO, 2004)

Worldwide insecurity is another factor that has made changes in market demand. Many of the changes have been in direct response to 9/11 and other more recent similar events. These have led to an important shift in travel market behaviour. It has enhanced the Caribbean tourism industry given that the region is being regarded as a relatively safe tourism destination, which clearly has improved the region's attractiveness (IPK International, 2003)

THE TOURISM AND MARKETING

Tourism is often spoken of in terms of being an industry comprising a range of products and services involving the overall travel experience. It includes accommodation, transportation, shops, food and beverage services and entertainment. All this is rarely provided by one business alone. Since the parameters of the industry are poorly defined it can be looked at as comprising three types of trades (Likorish & Jenkins 1997). Firstly, the primary trades most commonly associated with tourism such as tour operators, travel agencies, accommodation, transportation, attractions and restaurants. The trades that support tourism such as banks, entertainment, and insurance are the secondary trades.

Finally, the tertiary trades are the ones which provide the basic infrastructure and support for tourism such as fuel, public sector services, health services, agriculture, food and manufacturing. Being made up of different types of trades makes it difficult to maintain and control the quality of the experience. In order to overcome this obstacle, tourism related businesses and organisations need to work together to package and promote tourism in their areas and support their efforts to ensure consistency in product quality.

Tourism Planning, Development & Distribution

The complex organisation of tourism involves a large number of units. Planning, development and decisions about tourism is made at international, regional, national and local levels. All these functions must be carried out with a high degree of collaboration between the public and private sectors (Goeldner & Ritchie 2003). However, due to different goals and interests, in terms of tourism development, among governments, non-governmental organizations (NGOs) and industry organizations, decisions are often made without much collaboration or consultation.

The World Tourism Organization (WTO) is the leading international organization in travel and tourism. Regional organisations have the goal of attracting tourists to their specific geographic region. These regional associations can be multi-country or multi-state. Examples of regional tourism organisations include the Organisation for Economic Cooperation and Development (OECD), Pacific Asia Travel Association (PATA) European Travel Commission (ETC) and Caribbean Tourism Organization (CTO). At the national level governments promote their countries in the international tourist market through national tourism organisations (NTOs). Generally the main activities NTOs perform include promotion, research, coordination of tourism industry and information for tourists. In the Caribbean the Caribbean Tourism Organization (CTO) represents the interests of the Caribbean collectively in terms of marketing the Caribbean as a tourism destination while The Caribbean Hotel Association (CHA) promotes human resource development, product excellence, customer satisfaction, investments, and technology-driven marketing.

The Tourism Product

The idea of tourism as an industry assumes the production and sale of a common product. As a service based industry, the primary products provided by businesses in the tourism industry are recreational experiences and hospitality. It includes all the elements a destination has to offer including the physical, social and cultural environments as well as attractions, transport and lodging facilities, and other travel related services. The tourism product is an experience that begins before the actual consumption of the product and in some ways continues after the consumption.

What makes the tourism product unique is its complexity; it includes both tangible and intangible elements. The tangible elements being as concrete as a souvenir, an airline seat, or a dinner plate in a restaurant etc, while intangible elements being more abstract such as a feeling, climate or the friendliness of the host population.

The tourism product can be seen as being made up of three aspects; the experience, the place and the products. When buying an experience it cannot be grasped with any of the five senses, that is, one cannot taste, feel, see, smell or hear the experience. The buyer has nothing to display, to show to their friends or family, or to ever use again. In other words, the buyer goes away empty-handed but not empty-headed because what they have is an experience to remember and to talk about (Lewis, Chambers, & Chacko, 1995). Finally, the place refers to the tourist destination where certain components of the tourism experience are consumed while the products include individual physical products such as photos, souvenirs, food, beds and location.

Perishability

Tourism products have a high level of perishability, meaning that the products cannot be produced and stored today for future consumption. For example, if an airline seat on a specific flight, or a hotel room for a particular night is not sold, that opportunity to sell is

gone forever. In other words, a seat on a specific flight or a room for a particular night cannot be stored. This is why many airlines and hotels offer stand-by rates or last-minute sales at significantly reduced prices. The profit might be less however some of the lost revenue can be recovered. The flip-side of perishability is the perpetuability of the tourism product – it can be sold over and over again. A tourist is granted the use of the product bought but not the right to own it.

Inseparability

The service aspect of the tourism product makes it inseparable, production and consumption happens simultaneously and in the same place. The buyer must be present to experience or consume the service provided by the seller. A hotel room is produced at the same time as the guest is there consuming the product, same with a restaurant guest having a meal at a restaurant or a passenger on a flight. The entire product (service and good) is consumed on premise with the seller on hand and the customer never knows what is being bought until it has been consumed. Because of the frequent contact between the consumer and the producer it not only leads to inconsistencies in the quality of the product but customer satisfaction levels are very much affected. As a result, every time a service is being purchased, a new risk is being assumed.

Variability

Each interaction between producer and consumer is a unique experience affected by the human element. Individual differences among employees and among customers themselves lead to fluctuations in service (Lewis, Chambers & Chacko 1995). The mood and expectations of each individual involved in the service encounter leads to variability in the product. These human elements lead to inconsistency in the service and can lead to unsatisfying encounters. A tourist in an airplane, for example, may be looking forward to the vacation and is in a relaxed mood, expecting everything to be perfect, while the flight attendant may be stressed from long flights and overwork expecting the passenger to be sensible and understanding. However, the next encounter can be totally different and have a more positive outcome, all depending on mood and expectations.

Intangibility

Services are experienced and can therefore not be inspected prior to purchase or consumption. Because of its intangible nature, once consumed the product itself cannot be returned if the purchase is unsatisfactory. This requires a considerable effort for marketing and distribution of these products. Also, the product cannot be sampled before purchasing which makes the tourism product a high risk product. Because the customer cannot see, compare or try out tourist products before deciding to purchase, the need for reliable pre-purchase information is very important. Word-of-mouth is therefore an important source of product information.

Other characteristics

Simultaneous consumption is another characteristic of the tourism product. This means that, since a tourist doesn't always buy exclusive rights to use a product therefore the tourism product may be consumed by more than one tourist or group at a time. Moreover, the tourism product is not a single product but a package of goods and services which cannot survive without each other. The customer has to travel to the product rather than the product being delivered to the customer therefore the demand for tourism products is vulnerable and changes are affected by changes to foreign exchange rates and political instability. Finally, the seasonal demand for tourism is another factor which is part of the tourism product. The bulk of demand is in July and August. Tourism marketing is therefore concerned with trying to stimulate off-peak demand to improve the visitation at the destination at quieter times.

Distribution Channels

Distribution is one of the most critical factors for the competitiveness of destination and tourism organisations. Tourism distribution channels are organisational links between different organisations through which tourism product producers describes, sells, or confirms travel arrangements to the consumer. These channels are more convenient as

opposed to each supplier having its own retailer in every market destination. Since the primary distribution functions for tourism are information, combination and travel arrangements (Buhalis, 2003) travel agencies, tour operators and the internet are the main distribution channels.

A travel agent is a middleman in the purchase of certain services. They do not substitute the service-providing unit, but play the role of providing information and access to the visitor. The customer is matched to airlines, hotels, rental cars etc by the travel agent. In finding a reasonable air fare and issuing the ticket to the customer the travel agent provides a valuable service, saving the customer the time to contact the airline for an air fare and going to the airline office to buy the ticket. However, with the Internet it is much more convenient for consumers to buy their tourism products. There is 24 hour access, no commissions are involved, and it is easier to compare air fares at the consumer's own convenience. The personal encounter and advice given is what differentiates the travel agent from the Internet. This is what travel agents need to emphasise in order to maintain their position in the future.

The tour operator puts together a combination of different products into a tour package and sells the package through either retail agencies or through their own company. They can offer packages at a lower price than an individual customer can arrange because tour operators buy services in bulk at discounted prices. However, On-line services offer package deals as well and consumers can even build their own personalised packages. Therefore tour operators need to develop suitable solutions for the consumer and most importantly offer value for time and money.

TOURIST MARKET SEGMENTATION

The tourism industry has been globally segmented into an ever growing number of distinct markets. Market segmentation is the division of the tourist market into distinctive market segments that are supposed to be relatively consistent in terms of their behaviour (Weaver & Lawton, 2002). The tourism segments have evolved from mass market

tourism in the 1950s to niche markets and 'markets of one' in the 1990s. The market segments include Aboriginal tourism, Adventure tourism, Agricultural tourism (Agri-tourism), Culinary tourism, Culture and heritage tourism, Ecotourism, Health tourism, Learning and enrichment travel, Nature-based tourism, Spa-tourism, Sport tourism, Wellness tourism, Wine tourism and Winter tourism. This segmentation assists the tour operators in developing targeted products. It sometimes helps the customer to understand the product offerings but the detailed segmentation of the product can often times confuses the customer.

The concept of the virtual tourist destination

The virtual destination concept is emerging on the Internet. This is a strategic marketing tool, in form of a web-site, of a destination as a whole. It provides all the information that a potential visitor might need in the decision process when making the decision of where to travel. It does not provide information from a single source, but rather from an entire community, each providing information within its area of specialty. The web-site provides general information about the destination such as the geographic, environmental, economic and social context of the tourist destination's national and regional environment. Information on how to travel to the destination is also available. Additionally, information on accommodation, attractions, restaurants, sightseeing, and transportation at the destination is also provided. To ensure the consumer his/her safety, information is provided on public services and communications services. The aim is to provide all the information a potential visitor might need when selecting a destination. Visitors can view live videos of the destination and even prepare their own packages, and be placed in contact with the service providers to make reservations.

TOURISM MARKETING

Marketing is the production of goods and services to suit the needs and wants of an end-user or consumer (Kotler, Haider & Rein, 1993). This conventional definition of marketing involves the elements that make up the right combination of elements that will produce a profit; price, place, product and promotion - the marketing mix. Tourism

marketing involves discovering what tourists want. This is done through market research, which forms the base for the development of appropriate products and services. These products and services are communicated to potential tourist through advertising and promotion. Information on how and where to buy the products and services is given by for example tour operators, travel agents and airlines. Advertising begins with a base of creating awareness and strengthening a company's position or image (Dwyer & Tanner, 2002). The second role of tourism marketing is to create a favourable climate for salespeople, however in some instances, customers will order directly from the advertising, so the final purpose is to generate sales.

The Tourism Marketing Mix

The conventional 4Ps have been extended in recent years as certain features in relation to the marketing of tourism have become recognised as important. Several different marketing mix structures have been proposed, but the 8P model will be discussed below by focusing on the Ps that are particularly relevant to tourism. This includes an additional 4Ps; people, packaging, programming and partnership which applies to both destinations and individual companies.

People

Tourism is all about people; the tourist, service personnel and the local population. As previously discussed under variability and intangibility, the tourist as well as the service personnel affects the tourism product. Behaviour, expectations, mood, stress etc can affect the quality of the product. Therefore staff training, appearance, commitment, customer contact etc is very important to focus on. It is also essential to keep in mind that the local population is part of the product/destination. Some Caribbean destinations are known to have warm friendly people, on which countries such as Jamaica, Bahamas and St. Lucia have built their tourism promotion (Crick, 2003).

Packaging

In marketing tourism there is a need to understand that the tourism product is made up of a complex set of goods and services (travel agent, airline, car rental, hotel, restaurants, museums and other attractions, taxi etc). Packaging refers to combining two or more elements of the tourism experience into one product. Tour operators provide packages with transportation, accommodation, transfers, and visits to attractions, travel insurance and other tourism components. A destination packages the tourism product by marketing bundles of different activities, attractions and events at the destination. Regional tourism organisations market the region as integrated packages of attractions, events, activities and other tourism related services.

Programming

This P focuses on how to better package events, special activities and other programmes for the customer. It aims at adding to the appeal of a destination and increasing customer spending. A number of attractions can be linked together in order to have a mix of products and experiences. In attempt to move away from standardised holiday packages programmes can be added to, for example the traditional Caribbean beach holiday package offered by tour operators.

Partnership

As previously discussed there is a high degree of interdependency among all tourism stakeholders and a need for cooperation. Stakeholders are coming together in partnerships such as strategic alliances. In the tourism industry this started with airlines working together across countries and continents in order to get a greater market share. The alliances have expanded to include car rental companies, hotels, restaurants and shops. These working relationships are built not only with colleagues but sometimes also with competitors. The largest and longest established alliance is Star Alliance (see www.staralliance.com). Another example is Air Jamaica's a Frequent Flyer program, 7th Heaven, which rewards customers for trips taken which then can be used for buying an airline ticket within the same group 7th Heaven. Members of the group include Air

Jamaica, Delta, Virgin Atlantic, Air Canada, Hertz, Island Car Rental Jamaica, Travel Master Card, and Courtleigh Manor Hotel Jamaica. There are also special airport parking discounts in Miami and Baltimore. These strategic alliances benefit the members of the group in their attempt to keep the customer, but it also benefits the customer in being awarded for their loyalty.

NEW DEVELOPMENTS IN TOURISM MARKETING

As previously discussed sustainable tourism is a “buzzword” that has been used and misused and often times seen as a tool to achieve a competitive advantage (Wheeller, 1994). Many people would argue that marketing is the direct opposite of sustainable tourism because of the likelihood that an interest in sustainability will only be taken by the tourism industry if it is of the customers concern. However, some would say that this view is “both unrealistic and incorrect” (Swarbrooke, 1999). Henry Ford summed up the problem with putting consumers at the centre of innovative solutions, when he said, “If I had asked my customers what they wanted...they’d have said a faster horse”.

People’s lives are influenced by marketing, which makes it a very powerful tool. This of course, can be used in ways that can lead to more sustainable forms of tourism, which should be the concern of tourism stakeholders. A marketing technique that can be used in the pursuit of sustainability is de-marketing (Swarbrooke, 1999).

De-marketing

The concept of de-marketing was first coined by Kotler in the early 70’s (Kotler & Levy, 1971) however there is a lack of studies and examinations of the effects of de-marketing on tourism. De-marketing is referred to as ‘deconsuming’ by for example encouraging the restriction of advertising expenditure, reducing the number of distribution outlets and increasing prices (Kotler & Levy, 1971). This marketing technique is used to reduce the demand of something rather than increasing demand. It is however not used to get consumers to totally avoid a place or a product. One might ask why anyone would want to reduce the demand of tourism. The answer to this question could be, to ensure that the

product base upon which the tourism industry is built is secured for future use. In tourism there are three main ways to de-market, also called the 3Ps of de-marketing (Swarbrooke, 1999); people, peak periods and places

Destinations, attractions and tourism products in general can de-market people who are undesirable in one way or another due to for example spending capacity or behaviour. Young, heavy drinking tourists have become unwanted visitors in some Caribbean islands. Staying at all-inclusive hotels/resorts where everything, including drinks are free, not spending money outside the hotel can lead to the discouragement of more desirable market segments to stay at the hotel or visit the destination. This segment can be de-marketed by discouraging tour operators specialising in wild holidays from organising packages to the destination. The destination or the hotel can aim at repositioning in an attempt to try to make it less attractive to the “party tourist”. Additionally the destination or hotel can focus on information that will drive back the “party tourist” but at the same time be attractive to other markets.

Destinations suffering from over visitation during peak-periods can de-market these periods by increasing prices during this period. Furthermore, informing tourists about the congested periods in order to discourage them from visiting during that particular period.

Places that are perceived to receive too many tourists can be de-marketed in order to reduce the impacts of overcrowding. Approaches that can be used to reduce overcrowding includes; reducing information about the place, the sale of packaged holidays to destination with problems with overcrowding, raise the prices in order to lower the demand, and restrict access.

THE FUTURE

Travel and tourism remains one of the most important phenomena in today’s society and presuming that current forecasting is accurate, it will continue to grow in size and socioeconomic importance. The growth will continue as long as people want to go places

and want new experiences. This urge to see and experience new places has led to ‘Astro tourism’ (see insight).

The growth in demand for low-cost airlines has been exceptional, and it is likely to continue to grow as new carriers emerge in different regions of the world and as people continue in their search for 'good value'. However, with the current moves to introduce aviation fuel/environmental taxes high-speed rail will become cheaper. This can attract passengers away from air travel, which in turn will have adverse effects on destinations dependent on air traffic for their tourism industry to function, such as the Caribbean and Polynesia.

“ASTRO TOURISM” SPACE TOURISM

Human beings have always looked for something new to discover. The discovery of new places, seeing something different and going places that later can be bragged about to friends and relatives is a big part of tourism. Adventure tourism has grown in popularity in recent years with people who are willing to spend large amounts of money for a thrill. Now that almost every place on planet earth has been visited, people are looking towards the space as a new tourism destination.

The world’s first paying space tourist, a 60-year-old American millionaire Dennis Tito, left for the International Space Station (ISS) aboard a Russian spaceship on April 28, 2000. It took 2 days to get there. He paid US\$20 million for the trip. The second tourist who took off into space on April 25, 2002 was a 26-year-old South African Mark

Shuttleworth.



Today space can be experienced by anyone, not only astronauts. Two “space tour-operators” offer trips to space in a C-21, Space Adventures and Incredible Adventures for \$20 million. With enough air miles it is even possible to go for free.

Frequent flyer programs as a marketing tool has been successful within the airline industry where airlines have created strategic alliances in order to gain customer loyalty. One airline that has taken the step and joined forces with Space Adventures is US Airways. This is to enable passengers to use their frequent flyer miles to purchase tickets to space. Eric Anderson, President and CEO of Space Adventures said, "We are proud to have US Airways as Space Adventures' official domestic airline". We look forward to taking their passengers farther and higher than they have ever gone before." (www.forbes.com).

Virgin Galactic is planning to make it possible for travelers to visit space in 2008. With the space as a new tourist destination, the introduction of efficient, reusable spaceships like SpaceShipOne has the potential to allow the masses to visit space.



Source: www.virgingalactic.com

Studies show that tourists are increasingly looking for particular activities rather than selecting a specific destination (IPK, 2004). Destination management organisations and national tourist organizations will need to be much more creative in their marketing and promotions in order to attract these consumers.

The use of the internet to plan and book holidays is on the increase in Europe and the USA (Marcussen, 2003 & 2005) and a trend of late-bookings will most likely develop. Information technology will therefore be increasingly used strategically to enhance profitability and competitiveness for tourism organisations. This will also facilitate the planning, managing and marketing of destinations.

The demand for packaged holidays and all-inclusive tour packages is on the decline while the demand for partly packaged holidays and independent travel is on the rise. The new traveler prefers flexible and spontaneous itineraries and searches for authentic and

meaningful experiences (Weaver & Lawton, 2002). Customised holidays packaged after each individual's preferences is something that the tourism industry will be seeing much more of due to the increasing demand for authentic experiences. People are more and more looking for cultural and environmental experiences with the opportunity to learn something while on holiday. It is the "Bourgeois Bohemian" – Bobo's, who want to expand their cultural horizons through experiences and travel. They are looking for upper class products which results in a philosophically uplifting experience (Brookes, 2001). The combination a low-cost flight with five-star accommodation one week and staying in a hut in a local village the other week is becoming popular. Finally, the tourism industry can not count on the traditional returning visitor unless the destination can offer all variations the future tourist is looking for.

TOURISM MARKETING STRATEGY

The development of tourism strategies is predicated on a complete understanding of the linkage between the customers' needs/wants/desires and the 'product' being offered in terms of a destination/accommodation/food-service/recreation package that appeals to those needs. There will likely always be a mass appeal for the 3S, but operators in this quadrant will only succeed insofar as they can compete effectively in cost-price-utility terms. Cruise ships do this very well. But for land-based systems there is a pressing need to develop value packages that are specifically directed to niche markets.

Marketing managers must work with operators and other agencies in the tourism system to modify the services that are offered to match customer demands. Following the creation of appealing product features and value concepts, the promotional campaigns can be developed and harmonized with delivery and transactional systems.

Recently the Zulu Kingdom in South Africa garnered a considerable success in marketing their unique destination^{iv}. Their success, which is based on an effective Tourism Product Development Strategy applied a unique marketing strategy. "Unlike classic product marketing criteria, when the product is developed first followed by the marketing strategy, this report has instead been determined as a consequence of

marketing imperatives.” In this respect each destination was treated as a distinct product, exhibiting a clear and unambiguous differentiation from others. It focused on a marketing thrust directed at achieving the twin objectives of 'selling the place'(image marketing) and 'landing' the tourist (destination marketing), in which the *image* marketing promoted the 'sense of place' and destination marketing centered on selling the product.

The winning strategy was also driven by the use of public relations rather than relying extensively on the more costly above-the-line advertising campaigns. Thus media management was a crucial factor since it dealt with managing the county's reputation. Reputation management in tourism is rapidly becoming an emerging discipline wherein the central tenet states that a strong reputations is established when the creative theme and content are in tune with the distinctive values and personalities of a country. It is a truism in marketing that ideas are increasingly displacing the physical in the production of economic value, competition for reputation becomes a significant driving force.

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