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# National marketing strategies in international travel and tourism

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**Abstract** *Focuses on how national travel and tourism authorities can market a country as a tourist destination, with particular reference to the marketing of Australia and New Zealand to target markets in Germany and the United Kingdom. These two nations in Europe are by far the most important tourist generating countries for Australia and New Zealand and there has been a recent substantial increase in the value of international travel and tourism revenues and promising future prospects. However, there is little research emphasising specific marketing and distribution strategies that may be applied by travel and tourism organisations, airlines and intermediaries to market a tourist destination successfully in overseas markets. This research collected data using in-depth interviews with 41 experienced practitioners in Germany, the UK, Australia and New Zealand, and analysed the data with a rigorous case study methodology. The results of this research assist in clarifying the conceptual issues provided in the literature, linking theoretical marketing knowledge about strategies in the discipline of international travel and tourism marketing.*

## Background

Travel and tourism have become a global industry and are widely considered to be one of the fastest growing industries, if not the fastest growing industry in the world (WTTC, 1995). 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 and Smith, 1993). Thus the travel and tourism industry has become a major contributor to the gross national product of many nations, with marketing tourist destinations and its products becoming a widely recognised practice for both public and private sector organisations.

However, the literature provides scant guidance about how public and private travel and tourism organisations develop marketing and distribution strategies to deal with the special characteristics of and changes within long-haul markets. It provides general models, concepts and techniques for strategic marketing but there is no academic analysis of their application to the marketing of a country as a tourist destination. Thus the purpose of this

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research is to examine how international tourist destinations like Australia and New Zealand should be marketed strategically by national travel and tourism authorities, with particular reference to intermediaries and target markets in the UK and Germany.

This article has five sections. First, a review of the academic literature of strategic marketing in travel and tourism establishes a range of important marketing issues. Second, strategies are set into perspectives about an organisation's industry position in overseas markets, that is, market leader or nicher. Third, a rigorous case study methodology is established as the most appropriate methodology to address identified gaps in the literature. Nineteen case studies developed from four in-depth interviews with key informants in Germany, the UK, Australia and New Zealand are then analysed, using qualitative techniques such as cross-case and cross-nation analysis, data displays, and pattern-matching. Finally, the research identifies an extensive list of marketing and distribution strategies that are relevant to each organisation's industry position in overseas markets. From these findings about practitioners' experience, a strategy model is developed to help fill gaps in the body of knowledge.

The focus of this research is on marketing a country's tourism destinations as a whole rather than on marketing a particular tourism product such as an individual airline, hotel chain or resort. A national or federal tourism authority promotes a country's destinations, sometimes directly to tourists and sometimes through intermediaries; for example, airlines may play an important role in marketing tourist destinations in overseas markets.

### **Marketing management in travel and tourism**

Marketing's contribution to travel and tourism has been undervalued by both policy makers and practitioners, leading to a misunderstanding of the nature and value of the marketing discipline for the travel and tourism industry (March, 1994). Several authors have noted the lack of detailed work in relation to strategic issues in travel and tourism marketing and distribution processes which require a more rigorous analysis of contextual factors (e.g. Bagnall, 1996; Chon and Olsen, 1990; Faulkner, 1993a,b). Indeed, there seems to be a need to emphasise a more strategic approach to international travel and tourism, so that, for instance, a competitive advantage can be established in overseas markets (Boyd *et al.*, 1995; Go and Haywood, 1990; Mazanec, 1994; Papadopoulos, 1987, 1989). Similarly, other authors have argued that the marketing concept is based on a "long-term commitment" to the satisfaction of travellers' needs and motives (Haywood, 1990) and for a more strategic approach to marketing instead of relying on operational measures such as marketing communication (Faulkner, 1993b).

This research addresses travel and tourism strategies to rectify these deficiencies. There are three approaches to strategy that may be used by the travel and tourism industry. The consumer-oriented approach dominates most current discussion of international marketing strategies. Another approach

focuses on competition (Porter, 1980, 1990). However, these two approaches (or a blend of them) may be insufficient for they neglect the role of intermediaries in travel and tourism. Hence, a third approach to strategy, the trade-oriented orientation of intermediaries' desires, problems and demands needs to be investigated. Although each of these three approaches to strategic marketing will be discussed in turn below, they should not be regarded as alternatives, for they may be integrated into an overall strategy.

*The consumer-oriented approach*

Consider the first approach to strategy. Within the scope of this consumer-oriented approach, organisations can focus on two core marketing strategies (Day, 1990; Kotler, 1988):

- (1) an undifferentiated marketing strategy (full product/market coverage);  
or
- (2) a differentiated marketing strategy (product specialisation, market specialisation, or product/market specialisation).

Undifferentiated strategic marketing focuses on the average expectations of target markets: marketing efforts concentrate on the common interests of the target segments' needs and behaviour rather than their variances. In contrast, differentiated strategic marketing aims to identify the characteristics of diverse consumer groups through the use of marketing instruments directed at specific targets in order to create and implement a marketing approach and program that suits particular segments' needs and expectations (Kotler *et al.*, 1994). The extent of differentiation will vary depending on prevailing market conditions (Toyne and Walters, 1993).

*The competitor-oriented approach*

The next approach to strategy concentrates on competition. The travel and tourism industry is undergoing a period of rapid change and uncertainty, with new technologies and more experienced consumers being some of the opportunities and challenges facing the industry. The role of a competitive marketing strategy is to develop, maintain or defend the position of an organisation. Public and private travel and tourism organisations may either strive for an overall cost/price leadership, or differentiate themselves to gain a product quality leadership. Furthermore, a concentration on market niches may lead to a successful strategic position (e.g. Day, 1990; Toyne and Walters, 1993).

As a travel and tourism market becomes more mature (such as the UK and Germany markets for Australia and New Zealand), it will continue to segment itself (Brett, 1992). With greater maturity, niche marketing approaches appealing to a particular segment seem to become the focus of, in particular, travel and tourism organisations (Jefferson, 1995). In addition, airlines and intermediaries may specialise in sectors other than package holidays, that is, potential niches such as eco-tourism may become more important. However, charter packages may also become increasingly popular due to their low cost, a

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trend which suggests the growth of the mass tourism market (Australian Tourist Commission, 1994a).

*The trade-oriented approach*

The third approach to strategy focuses on intermediaries and appears to be particularly relevant to the travel and tourism industry. The distribution of travel and tourism products/services is a most important activity along the tourism chain (Poon, 1993). There are two main considerations which need to be distinguished: first, the degree to which organisations become involved in organising and structuring the overseas distribution channel, and second, organisations' reactions and responses to marketing and distribution strategies of intermediaries in overseas markets. As a result of organisations' activeness or passiveness with regard to these two considerations, four trade-oriented strategies are possible: by-passing, co-operation, conflict, or adaptation (for example, Meffert and Kimmeskamp, 1983).

A by-passing strategy means travel and tourism organisations or airlines would relinquish any collaboration with the distribution channel. The appropriateness of this strategy for public and private travel and tourism organisations seems very limited, considering the current importance of intermediaries in most overseas marketplaces.

However, co-operation strategies are widely adopted in vertical marketing. These interactive forms vary on a continuum from very loose co-operative forms with fairly unrestrained degrees of binding forces or commitments based on, for example, flows of information, through to very strictly regulated distribution systems (Webster, 1992).

In contrast to the co-operation strategy above, active reactions in organising and structuring the distribution channel can lead to a conflict strategy whenever the marketing communication strategies and activities of the trade are not given sufficient attention or are even ignored by travel and tourism organisations or airlines. That is, travel and tourism bodies attempt to bring about or enforce their own interests against the resistance of the trade in order to gain marketing leadership in the distribution system.

The final, adaptation strategy is characterised by a passive reaction of public and private travel and tourism organisations to the marketing strategies of intermediaries in terms of organising and structuring the distribution channel (Meffert, 1989). That is, initiatives of these organisations are very scarce. Such passive behaviour would not apply to a marketing-oriented organisation and will therefore not be followed further in this research.

In brief, all the three approaches of consumer-oriented, competitive market and trade-oriented may fit into an overall strategy with varying degrees of emphasis that are not yet known with precision.

**Industry/market positioning**

Before any mix of these three approaches is adopted, travel and tourism organisations have to identify their industry/market position in the overseas

market. Consider these organisations in Australia and New Zealand and their complex industry/market positions, for example. Travel and tourism is an Australian and New Zealand growth industry and many factors provide prospects of a long-term growth market. Forecasting studies of the Australian Tourist Commission (for example, 1994b) have predicted high growth rates in total arrival numbers, in particular the holiday market, and increasing yield figures from almost all overseas countries underline the growing significance of the travel and tourism industry.

When comparing tourist markets of the UK and Germany for Australia and New Zealand, the former is the more mature, mainly because of Australia's and New Zealand's historical alignments with the UK. However, both markets have had strong tourist arrival and receipt growth rates in the past ten years and forecast arrival and receipt figures seem to follow that trend (WTO, 1994a).

Nevertheless, the two countries compete for tourists against the often bigger marketing budgets and resource infrastructures of other marketing authorities of the South-East Asian and Pacific region. For example, Australia is perceived as a market challenger against tourist destinations such as Hong Kong and Singapore in the long-haul travel market to East Asian/Pacific in the UK (WTO, 1994b). Both Hong Kong and Singapore are strong competitors with proactive, targeted National Tourist Offices supported by strong marketing of Cathay Pacific and Singapore Airlines. Indeed, in the faster growing German market, Australia is regarded as a nicher, ranking a lowly sixth among the most popular East Asian/Pacific destinations. In turn, New Zealand is a nicher in both the UK and Germany. Emerging, new long-haul destinations such as South Africa, Vietnam, Cuba and the South Pacific are also becoming a threat to Australia and New Zealand.

In brief, previous research does not resolve whether some strategies are more important than others in terms of marketing a destination/product in overseas markets. As a result of the above discussion, this research examined marketing and distribution strategies used by Australia and New Zealand travel and tourism authorities in their UK and German markets. Figure 1 summarises the initial framework developed for the data collection and analysis stages of this research.

### **Case study methodology**

A rigorous case study methodology was used to address the research problem. In research like this about the relatively new area of strategic travel and tourism marketing where phenomena are not well understood and the interrelationships between phenomena are not well known, a qualitative research approach seems a more appropriate method than quantitative research methods (Butler *et al.*, 1963; Parkhe, 1993). The application of case studies as a qualitative research methodology is widely recognised (for example, Eisenhardt, 1989, 1991; Parkhe, 1993; Perry and Coote, 1994; Yin, 1993, 1994). Particularly in situations like this, when "how" questions are being posed, when the researcher has little control over events, and when the focus is

**Australia/New Zealand**  
[micher (0)]

<p><b>marketing and distribution strategies:</b></p> <ul style="list-style-type: none"> <li>• joint marketing with related businesses</li> <li>• find innovative and creative ways to communicate with customers</li> <li>• <b>(more) intensive relationships with industry partners</b></li> <li>• <i>distinctive product or price differentiation</i></li> <li>• deal with selected target markets/segments and distributors</li> <li>• enhance publicity at small costs</li> <li>• distribution strategy may be a major focus</li> <li>• <b>use of education and training strategies to enhance the level of professionalism and to provide sufficient information</b></li> <li>• investments in communication technology</li> <li>• implement database marketing techniques</li> <li>• target return visitors</li> </ul>	<p><b>marketing and distribution strategies:</b></p> <ul style="list-style-type: none"> <li>• joint marketing with related businesses</li> <li>• find innovative and creative ways to communicate with customers</li> <li>• <b>(more) intensive relationships with industry partners</b></li> <li>• <i>distinctive product or price differentiation</i></li> <li>• deal with selected target markets/segments and distributors</li> <li>• enhance publicity at small costs</li> <li>• distribution strategy is a major focus</li> <li>• <b>use of education and training strategies to enhance the level of professionalism and to provide sufficient information</b></li> <li>• investments in communication technology</li> <li>• implement database marketing techniques</li> <li>• target return visitors</li> </ul>
<p><b>marketing and distribution strategies:</b></p> <ul style="list-style-type: none"> <li>• enter new unfilled market segments</li> <li>• <i>broaden product line with new products, then concentrate on profitable products</i></li> <li>• competitive pricing/quality is a key factor</li> <li>• <b>(more) intensive relationships with industry partners</b></li> <li>• marketing effectiveness is a key function</li> <li>• <i>narrow product lines in distribution channels to improve their margins</i></li> <li>• concentrate on a low-cost distribution system</li> <li>• <i>expand distribution coverage and intensity</i></li> <li>• <b>use of education and training strategies to enhance the level of professionalism and to provide sufficient information</b></li> <li>• co-operate with (other) distribution channels</li> <li>• development of the charter airline market</li> <li>• establish/maintain close relationships with media and press</li> </ul>	<p><b>marketing and distribution strategies:</b></p> <ul style="list-style-type: none"> <li>• enter appropriate unfilled market segments</li> <li>• marketing and distribution effectiveness are key functions</li> <li>• <b>(more) intensive relationships with industry partners</b></li> <li>• <i>practical to change price or quality image</i></li> <li>• <i>high marketing communication, in particular advertising</i></li> <li>• <i>innovative and creative flair of messages</i></li> <li>• increase distribution coverage and enter new distribution channels</li> <li>• <i>investments in communication technology</i></li> <li>• <b>use of education and training strategies to enhance the level of professionalism and to provide sufficient information</b></li> <li>• co-operate with distribution channels</li> <li>• <i>shift from product-awareness advertising to product-preference advertising</i></li> <li>• <b>development of the airline market</b></li> <li>• establish/maintain close relationships with media and press</li> </ul>

**Australia**  
[quality or price leader (1)]

**Australia**

**United Kingdom**  
(*mature* market with some growth potential)

**Germany**  
(*growing* market)

**Note:** (1) Strategy of the national travel and tourism authority in the combined East-Asia/Pacific segment on the UK and German market

**Figure 1.** Strategy model for national travel and tourism authorities (with strategies of unexpectedly minor importance in italics and newly identified ones in bold)

on a contemporary phenomenon within some real-life context (Yin, 1994). Another reason for using the case study method for this research was to obtain holistic in-depth understandings, explanations and interpretations of a particular situation and its meaning by collecting data about practitioners' rich experiences (Gilmore and Carson, 1996).

Selecting the type of cases to be included in the research is a critical part in the case study method. Multiple case studies were chosen for they provided robustness to the study (Yin, 1994). The logic underlying the use of multiple case studies is that each single case has to be selected in a manner that either predicts similar findings (literal replication) or produces contrasting findings but for predictable reasons (theoretical replication) (Parkhe, 1993; Yin, 1994). With replications over several cases, the researcher can have more confidence in the overall results (Yin, 1993). Thus both types of replication were used in this research to provide an information-rich body of data from which insights could be developed. As well, the adoption of a case study protocol and case study database contributed to a sound research design.

The selected case studies provided sufficient information to elucidate the research issue (Lincoln and Guba, 1985; Patton, 1990). A total of 19 cases in Germany, the UK, Australia and New Zealand were selected to achieve literal and theoretical replication from a range of public and private organisations marketing and distributing tourist destinations/products in the two overseas markets. Eight case studies involved federal/state/territory Australian and New Zealand travel and tourism organisations, all of which developed and directed their marketing and distribution strategies from UK and German offices. Another four case studies were airlines: two were Australian and one each from New Zealand and Germany. Furthermore, seven case studies of UK and German intermediaries developed a total of 19 cases from 41 in-depth interviews. The number of cases is larger than the 12 or so suggested by Eisenhardt (1989) and others (e.g. Miles and Huberman, 1984; Romano, 1989); however, still other authorities do not provide any limits on case studies (e.g. Lincoln and Guba, 1985; Patton, 1990; Stewart and Cash, 1991). In brief, the number of cases provided an appropriate coverage of strategic marketing practices.

The case studies were developed with in-depth interviews with at least two respondents from each travel and tourism organisation and airline, and at least one respondent from intermediaries. All respondents were knowledgeable about the application of marketing and marketing communication strategies and activities. Two interviews in each organisation provided triangulation (Denzin, 1978).

All cases were inspected in a set to explore if they fall into clusters that share certain patterns (Huberman and Miles, 1994; Ritchie and Spencer, 1994). Content analysis, cross-case and cross-nation analyses were used to identify and interpret concealed patterns for each of the interview protocol questions. These analyses were done primarily through pattern matching (Yin, 1994) of matrices of data (Miles and Huberman, 1984). Only the findings, which clearly showed

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support for a theoretical proposition, are reported below. A comprehensive report of the analyses and findings is available from the authors.

The quality of research depends on the attention given to issues such as validity and reliability. Procedures suggested by authorities such as Yin (1994) and Miles and Huberman (1984) were followed. For example, construct validity was achieved by triangulation of data from many sources of evidence, establishing a chain of evidence during the data collection phase by having an interview protocol for all interviews, and having drafts of case study analyses reviewed and confirmed by interviewees.

It should now be clear that some delimitations had to be set to this research. First, note that this research investigates the national travel and tourism authority's positioning of the country's destinations as a whole, and not the positioning of those destinations appropriate for a particular segment like the leisure tourism, or the visiting friends and relatives, or business segments. Although an authority may sometimes consider these segments, our concern is with the country's destinations as a whole, for that is the major concern of a national travel and tourism authority. The primary focus of this research is public and private organisations, which actively market, through an overseas office, a tourist destination and its products/services to intermediaries and target markets in overseas markets.

Second, this research focused only on strategic marketing issues of Australian and New Zealand travel and tourism bodies, in relation to their UK and Germany markets. Within Europe, these two tourist-generating regions are priority markets for Australia and New Zealand in terms of visitor arrivals and also travel and tourism expenditure. Hence it may not be possible to extrapolate the results in simple fashion from those markets to other markets for Australia and New Zealand.

### **Findings and their place in the literature**

This section summarises the findings about marketing and distribution strategies used by travel and tourism organisations, airlines and intermediaries to address their UK and German target markets, including respondents' perceptions of their importance. It also shows how these findings differ from expectations from the literature, that is, the contributions of the findings. This research contributes to findings in strategic travel and tourism marketing management by proposing a number of core strategies according to an organisation's position (leader or nicher) and its approach to its overseas market (customer-oriented, competitor-oriented, and trade-oriented).

#### *Three approaches towards strategic marketing*

The literature on strategic travel and tourism marketing management processes indicates little research on strategic marketing, as discussed above (Chon and Olsen, 1990). Several authors have emphasised the urgent need to address strategic marketing in international travel and tourism in order to establish a competitive advantage in markets (e.g. Chon and Olsen, 1990;

March, 1994; Mazanec, 1994). The findings of this research supported the significance of each of the three approaches to strategy noted above, and so they are discussed next.

*1. The consumer-oriented approach*

The literature identified two core strategic approaches (undifferentiated and differentiated) within the scope of consumer-oriented strategies in marketing management (e.g. Becker, 1988; Kotler, 1988). However, there was no suggestion in the literature as to which consumer-oriented approach Australian and New Zealand organisations were expected to have used in overseas markets. Marketing approaches utilised by Australian and New Zealand travel and tourism organisations and airlines to reach potential customers in the UK and German market were identical. Most organisations focused on a selective marketing approach aimed at covering a few target segments in both markets. This approach helped organisations to aim at specific characteristics of diverse target segments and intermediaries and to inform them about the destinations' variety of products/service types.

That is, a mass marketing or extensive marketing approach was rarely perceived as appropriate. Only a few respondents noted the use of a mass marketing (covering all segments) or extensive marketing approach (covering all or most segments) to try to reach numerous potential customers which show the same characteristics. Nevertheless, no organisation indicated the use of a single marketing approach (covering one particular segment only). Respondents preferred to market to a few specific segments because of their limited financial resources and because it was found difficult to position a destination to appeal to all market segments.

*2. The competitor-oriented approach*

The literature identified that competitive strategies in travel and tourism could be used to ensure a competitive advantage for tourist destinations, as discussed above (Poon, 1993; Tse and Olsen, 1991). This research did not fully support the literature's argument for a strategic marketing approach that was entirely or partially oriented to cost/price leadership in the marketplace. That is, the two requirements which the literature identified as necessary to achieve cost/price leadership were rarely met by the travel and tourism organisations and airlines: a relatively large share of the overseas long-haul market, and a low-cost distribution system in the marketplace (Porter, 1980). In practice, visitor numbers were relatively low compared to other long-haul destinations in the Asia/Pacific region competing for similar markets (especially from Germany); and distribution costs in UK and German markets were perceived as rather high by most respondents. However, it was confirmed that cost/pricing should not be totally ignored when focusing on a differentiation or niche strategy (Porter, 1980). Thus organisations used competitive pricing for some campaigns, especially for some price-sensitive UK target segments. Overall, though, pricing was not perceived to be a core factor.

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Leadership in product quality was the second identified competitor-oriented strategy within the literature. As argued by several authors, a product quality differentiation strategy should be a core focus in determining competitiveness in the international travel and tourism industry (Berry and Parasuraman, 1991; Go and Ritchie, 1990; Porter, 1980). This research fully supports the literature, for most respondents perceived the quality of their destination and its products/services as a significant competitive advantage around which marketing and distribution strategies are grounded. Thus strategies based on differentiation of product quality, for example, entering appropriate unfilled segments, focusing on cost-effective marketing and distribution, and establishing or maintaining intensive and co-operative relationships with industry partners played a significant role for most respondents in both overseas markets.

The third strategy suggested in the literature which seemed important for many organisations was the one of market niches, based either on a product or on market differentiation which can depend on qualitative advantages and/or advantages based on cost/price. Some authors have noted that a combination of both these advantages could be directed at particular target markets and segments (Porter, 1980; Hodgson, 1987). Respondents of this research have supported these strategies for niche markets and implemented them in both their overseas markets to a large extent.

### *3. The trade-oriented approach*

In addition to consumer-oriented and competitor-oriented strategic marketing approaches, the literature identified a third approach which focused on the distribution channel, that is, the use of intermediaries are particularly significant in the travel and tourism industry. As noted above, the literature identified four main trade-oriented strategies (for example, Meffert and Kimmeskamp, 1983); of these, the research only confirmed the significance of co-operation strategies in international travel and tourism.

That is, strong support for co-operation was established in this research showing that marketing and distribution strategies were primarily directed to intermediaries rather than directly to consumers. Details of these strategies are available in the comprehensive report available from the authors. However, in general, only key UK and German intermediaries (mainly specialists) were regularly provided with marketing services by public and private organisations examined. However, this research found several services that were not specifically noted in the literature. The four most important services offered to those intermediaries in both marketplaces were:

- (1) expertise in product information;
- (2) involvement in familiarisation trips;
- (3) training seminars for, and regular meetings with, intermediaries; and
- (4) the provision of collateral material and the involvement in sales promotions for direct sales support.

Direct activities were merely significant for establishing and/or maintaining a presence and visibility in both markets, but the focus was clearly on indirect marketing communication activities, that is, reaching customers through intermediaries.

Overall, marketing strategies were driven by creating a sense of urgency about travelling to destinations such as Australia and New Zealand. Both UK and German markets showed an increasing interest in Australia and New Zealand, marketing strategies were focused on influencing markets by co-operating with intermediaries and enhancing their level of education, increasing visitors' length of stay, and emphasising the destinations' clean and safe environment and their core icons and attractions. Similarly, marketing strategies were mostly achieved through co-operative media and tactical advertising in both markets. In the main, distribution strategies were characterised by tactical campaigns with major wholesalers and specialised travel agents in the marketplace, for these often made funds available and had the potential to help convert the market in the UK and Germany. Thus distribution strategies were primarily aimed at establishing links and co-operating with key intermediaries in the marketplace to increase customers' availability and access to information material.

#### *Marketing and distribution strategy model*

The extant literature did not specifically consider Australian and New Zealand travel and tourism organisations' and airlines' approach to overseas marketing communication tactics within a strategic marketing and distribution context. To fill this gap, this research proposed a travel and tourism strategy model in Figure 1 (based on Becker, 1988; Brown, 1990; Kotler *et al.*, 1994; Poon, 1993; Porter, 1980), which was tested in national organisations in the UK and Germany. Based on the Figure's strategies developed from the literature and key respondents' perceptions, this research's contribution is the establishment of the significance of a number of marketing and distribution strategies with regard to two markets: for mature markets with some growth potential and growing markets.

In brief, the strategies for a national travel and tourism body are to be a:

- leader, challenger or follower in a mature market with some growth, such as the UK (upper left box of Figure 1);
- leader, challenger or follower in a growing market, such as Germany (lower left box); and
- nicher in a mature market with some growth or a growing market, such as the UK or Germany respectively (upper and lower right boxes).

As noted above, the strategy model of Figure 1 summarises our contributions to the literature about strategies of national travel and tourism bodies. Newly identified strategies are highlighted in bold and strategies of unexpectedly

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minor importance for some or most respondents in overseas markets are shown in italics.

In brief, the analysed field data confirmed the significance of most of the strategies of mature markets and supported several other strategies. Support was found for most of the strategies of growing markets in Germany, that is, many of them were implemented in respondents' international strategic approaches. Most of the strategies developed in the strategy model for niche market players were also confirmed as being very important in both overseas markets.

### **Conclusions and implications for theory and practice**

Several authors have argued that marketing's contribution to travel and tourism has been undervalued or misrepresented, and misused (Calantone and Mazanec, 1991; March, 1994). Indeed, a review of the extant travel and tourism literature indicated that little research has addressed strategic marketing in travel and tourism (for example, Chon and Olsen, 1990; Haywood, 1990; Mazanec, 1994; March, 1994). Also, travel and tourism marketing as a management discipline has been often misused and under-utilised (Calantone and Mazanec, 1991; Faulkner, 1993a), and served the needs of policy makers rather than practitioners (March, 1994). This perception may have caused practitioners not to implement theoretical models and to be sceptical about the use of the findings of academic research (Cooper *et al.*, 1993). This research's findings are based on practitioners' experiences and perceptions and, as such, strategic marketing issues raised in this research might find a higher acceptance and consideration in managerial marketing planning and decision-making processes.

This research contributes the first three-dimensional approach to examining marketing and distribution strategies (combining consumer-oriented, competitor-oriented, and trade-oriented strategies) for public and private travel and tourism organisations. The proposed strategies, illustrated and summarised in the strategy model of Figure 1, can be used as a guide for organisations finding themselves in similar industry positions and conditions as the examined ones, when looking at addressing strategic issues in UK and German markets or markets with similar characteristics.

That is, the research has implications for managerial decision making. Based on the importance of strategies currently used by Australian and New Zealand practitioners to target UK and German intermediaries and market segments, this research identified an extensive list of strategies, which are relevant for each organisation's specific industry position. That is, in mature markets with some growth potential, growing markets, and niche markets (see Figure 1). The list of potential strategies may also be used by organisations other than those examined that find themselves in similar industry positions in these markets and in similar maturity or growth phases. Thus its appropriateness for follower and challenger strategies could be investigated in

later research, as could its appropriateness to the marketing of regions within countries.

In conclusion, this research showed that the continuation of travel and tourism as a dynamic industry depends on the adoption of strategic marketing approaches that were addressed by most organisations examined. The findings should assist in developing a balanced strategic marketing approach to positioning a nation's travel and tourism industry in overseas markets.

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