

Chapter 14

Tourism Destination Re-positioning and Strategies



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14.1 Introduction

The marketing of destinations has always been a highly competitive domain as places seek to attract the many economic benefits that can accompany increased levels of visitation by tourists. With levels of both domestic and international tourist arrivals increasing on a yearly basis, the market is awash with demand for touristic places. So too, however, is it increasingly inundated with a supply of destinations eager to attract the tourist and the economic benefits that follow. Perhaps most striking is the array of new destinations emerging with the likes of Tulum (Mexico), Cartagena (Colombia), Banff (Canada), Brighton (UK) and Gatlinburg (USA), among others, beginning to make their mark on the international tourism landscape (Skift 2016). Although more traditional destinations such as London, Bangkok and Paris continue to dominate international tourist arrivals (18.82 million, 18.24 million and 16.06 million respectively), the emergence of so many new destinations around the world serves to heighten the competitiveness of the marketplace and the need for tools and techniques for destinations to maintain and/or increase their competitive position. Most challenging, perhaps, is their ability to be truly distinctive in the marketplace. This especially being the case as so many destinations are now moving beyond tourism as they seek to position themselves as great places to live, work, invest and study as well as visit.

In addition to the competitive forces at play, destinations increasingly need to adapt to the changing needs, wants and drives of the market in the form of changing tourist preferences (i.e. “push” factors) as do they need to keep abreast of often fixed or outmoded images and reputations that no longer mirror the attributes and strengths of the destination (i.e. “pull” factors) (Tkaczynski et al. 2006). For many

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destinations around the world, re-positioning represents an opportunity to rejuvenate and re-energize themselves with the likes of New York City, Glasgow, Amsterdam and more recently Brisbane in Australia seeing a change in its fortunes in response to a deliberate, strategic approach to change. While each of these examples have combined strategic approaches to re-positioning with more widespread policy, governance and economic reforms, a number have also used the hosting of sporting festivals and events to stimulate a deliberate change in focus (Insch and Bowden 2016). This was especially the case with South Africa and its hosting of the 2010 FIFA World Cup™ and its strategy of using the hosting of this sport mega-event to re-position the nation brand of the country at large (see Knott et al. 2013). Rather than simply representing a logo or brand, South Africa was able to demonstrate through very tangible and intangible means (most notably through its infrastructural development and warmth of the visitor welcome) that there was real substance to its re-positioning; something that is far from always the case.

14.2 Forces for Change

Before attending more specifically to the strategies adopted by destinations to position and re-position themselves in the marketplace, the following section highlights many of the generic forces for change in the highly complex and turbulent macro environment and the ever-increasingly competitive micro environment.

14.2.1 *Forces for Change in the External Environment*

Irrespective of their size, location and market appeal, all destinations are subject to a number of forces for change in their external macro and internal micro environments. So much so that Fyall (2011) developed the 15 C's Framework that provides a synthesis of forces for change for all destinations as they prepare to face the future and the insatiable demand among many markets for their products, services and experiences. In a more recent communication from Edgell (2016), ten wider forces of change were outlined with each impacting destinations on their future development, market appeal and economic prosperity. The latter point is particularly noteworthy in that the first force for change mentioned is that of maintaining a destination's sustainability. Although with a strong social, cultural and environmental bias with regard to the protection and preservation of both natural and built resources, the economic sustainability of many destinations is under threat from shifting travel patterns, the omnipresence of travel intermediaries and increasing concentration of power in the global travel industry. Globalization more broadly and the current precarious global economic climate also continue to pose a threat to many destinations albeit with the neo-liberal approach generating "winners" and "losers" in the international destination "marketplace" (see Sharpley and Telfer 2015). The recent political turmoil in the UK with "Brexit" and in the USA with the election of a

new president actively opposed to the current world economic order represent just two examples of the changing economic and political landscape globally with which destinations will have to navigate. It is interesting to note that in the case of the UK, the country's referendum to leave the European Union resulted in a significant drop in the value of its currency which, in turn, has had a hugely positive impact on inbound tourism! It is, however, most unlikely that there will be such a reaction to outbound travel as the fall in the value of the British currency raises the cost of travelling abroad substantially. Such challenges necessitate high quality leadership with the demands for those marketing and managing destinations increasing in complexity and scope.

One of the most pressing challenges facing many destinations, most notably those of a coastal nature, is that of climate change with short-, medium- and longer-term consequences of rising sea levels, the warming of the oceans and more extreme weather patterns proving problematic and necessitating adaptive measures to protect the resource base of tourism. A more tangible challenge for many is that of safety and security with many destinations popular with tourists central to terrorist activity in recent times with Tunisia, Egypt and France, among others, struggling to manage the diversity and relative unpredictability of such events and their detrimental impact on visitation. This is also true of the effect on travel and tourism from natural/human-induced disasters, health issues and political disruptions. The Zika outbreak in Brazil, with it now stretching across Central and Southern America, the Southern United States, Malaysia and Singapore, high levels of obesity, especially among the young, in many developed nations, and political upheavals in many developing countries collectively make managing the impacts of external environmental forces so challenging.

Although true for all aspects of travel and tourism, the speed with which emerging technologies are evolving and their omnipresence across the wider tourism and hospitality industries is such that different forms of leadership may now come to the fore while the transformative effect of travel itself on global socio-economic process is also to continue to play a role in the future. Finally, the continued emergence of new and developing nations in the world order is such that competition will not only increase but will become more intense as travelers seek newer, more exhilarating and more challenging places to visit. Although not only of significance to emerging destinations, the need to resolve existing barriers to travel while at the same time preserving border security and immigration controls continues to impact all aspects of the industry with many previously high-demand destinations such as Paris for the first time in many years now experiencing reduced levels of demand from high-spending international visitors.

14.2.2 Forces for Change in the Internal Environment

With the UNWTO now tracking the performance of over 200 countries worldwide it is clear that if one were to consider all international, national, regional and local destinations available to tourists the choices are overwhelming. Hence, the

competitiveness of destinations and their need to respond to changing levels of expectations in the marketplace are such that the marketing and management of destinations is clearly not for the feint-hearted. Most significant, perhaps, is the fast-changing nature of the “consumer” who according to Pride (2016) is seeking more individualized experiences and tailored forms of authenticity than ever before (where one size most certainly does not fit all), is relying more and more on social media, and is exhibiting a healthy disdain for traditional institutions and is most definitely exhibiting impatient trends such that it is now assumed that the average consumer has an attention span of 8 s! These same consumers are, however, integral to creating their own tourist experiences with their opinions, images and uploads on social media commonplace in most parts of the world and instrumental in shaping future patterns of behavior in the market. This is most certainly true with regard to the exponential growth of the sharing economy (i.e. Airbnb) while the quest for “quiet and calm” away from perceived “over-capacity” and “dangerous” destinations opens up many avenues for destinations on the fringes of the destination “beauty contest”. Cape Town, South Africa, is one such destination with a recent promotional video circulated on YouTube generating in excess of three million views in a matter of days! This is even more remarkable when one considers the overload of information now evident in most markets. There is also the creeping realization that greater degrees of social capital are being sought by travelers with an emotional attachment to products and places and sense of belonging in a “virtual world” very much in play.

In view of the above forces for change, the following section outlines the typical pattern of development for many destinations and the underpinning rationale for the need for strategic re-positioning as a vehicle to enhance competitiveness and longevity in what has become a highly crowded marketplace.

14.3 Destination Development, Image and Positioning

14.3.1 Destination Development

Underpinning all of the above forces for change is the enhanced nature of competition in the destination marketplace and the seemingly endless quest to remain distinctive and competitive at a time of constant change. Although all of the aforementioned factors will impact destinations in different ways, for destinations of all types and regardless of the market(s) they attract, all follow development patterns that are consistent with the tourism life cycle (Kozak and Martin 2012). As destinations become more popular, attracting countless more tourists, developers, and related industries, a plateau is eventually reached. Once destination growth plateaus, the trend typically sees a decline in popularity and a need for newer, exciting introductions to attract more tourists. In an attempt to compensate for the decline in a destination’s popularity as it reaches market maturity, those managing destinations tend to overcompensate by multi-segmenting the image of the destination to attract a

broader audience. One of the problems inherent with this approach is that it frequently results in a traveler's perceived destination brand image that is inconsistent with the destination's intended image. As such, the brand image and integrity of the destination becomes skewed, undefined, and incompatible with the market, with destination re-positioning one of the means by which such an outcome can be rectified (Kozak and Martin 2012).

In a similar vein, Oehmichen (2012) comments that when destinations reach maturity in their life cycle, they ultimately must re-invent themselves to remain more competitive. In many cases, however, destination re-positioning is not a result of simply reaching maturity in the life cycle as evident from Chacko and Marcell's (2008) analysis of the re-positioning strategy of New Orleans following the devastation caused by Hurricane Katrina in 2005. Rather than examining New Orleans from a destination maturity standpoint, their lens was one of "post-disaster marketing". For example, when potential tourists saw New Orleans and its tourist districts under water during news broadcasts, their immediate reactions led them to consider other destinations. The reason for this is that the only images that people saw were those of destruction, not re-construction or historical value. In fact, the single worst natural disaster in US history proved to have economic effects that were felt for nearly a decade following the cleanup. Because of the perception of destruction, New Orleans had to re-position itself as a tourist destination, creating a new brand image that incorporated not only their pre-Katrina history and culture that New Orleans was so known for, but also the history and image of overcoming such a tragedy (Chacko and Marcell 2008). Re-positioning New Orleans as a destination has resulted in a dramatic increase in the size of its tourism market. A similar narrative follows attempts by the Egyptian authorities to repair the country's image during its myriad of crises in recent years including violent changes in the national government, internal political tensions and terrorist attacks which resulted in travel warnings for international visitors (Avraham 2016). Unlike New Orleans, however, Egypt is yet to record a reversal in its tourist fortunes vis-à-vis visitor numbers.

14.3.2 Changing Tourist Behavior

Aside from the destination re-positioning of places such as New Orleans and Egypt, where re-positioning was necessary due to a tragedy, destination re-positioning is also a process that takes place as trends in the market begin to emerge. According to Plog (2001), destinations are constantly rising and falling in popularity resulting in a constant need to adapt to market trends and consumer demands. In fact, in order to fully understand destination re-positioning, and its impact on the market, it is important to understand a number of factors that are causing the need for the re-position in the first place. Plog (2001) argues that this can be accomplished through a greater understanding of the personality profiles of the destinations' target market(s) through a set of psychographic studies. In addition, those marketing

destinations need to identify the personal distributions of those who both visit and are interested in the destination, determining what draws them to the destination, what's preventing them from visiting, and what their needs/wants are from the destination in question. Tkaczynski et al. (2006) adopt a similar stance by advocating a detailed understanding of the changing needs, motives and drives of visitors and those destination images and attributes that attract them.

Consistent with the view of Kozak and Martin (2012), Plog (2001) points out that knowing one's place in the destination life cycle is beyond crucial for understanding the type of repositioning required. In fact, he points out that if the planners of a destination's development understand the "psychographic curve", they will be able to control and maintain ideal positioning in a destination's tourism development. This is becoming more vital in the modern world with generational shifts indicating large changes in behavior among Millennial's which, in turn, is altering the normal marketing and branding tactics of destination position. Destinations historically considered to be dependable may be less so in the future as increasing demand for experiential tourism is driving more tourists to seek less traditional, "venture" destinations (Plog 2001). In such instances, destination re-positioning needs to conform to the less traditional demands of the newer, younger travelers who seek the "experience" more than they do the actual "destination".

14.3.3 Image, Positioning and Re-positioning

Before outlining a comparative account of destination positioning and re-positioning in practice, it is timely to clarify some of the key terms pertinent to this chapter. Firstly, Kotler et al. (2005, p. 280) provides a very clear definition of market positioning as the "way a product is defined by consumers on important attributes – the place the product occupies in consumers' minds relative to competing products". This is equally true of destination positioning and re-positioning with a major objective of any destination positioning strategy being "to reinforce positive images already held by the target audience, correct negative images, or create a new image" (Pike and Ryan 2004, p. 334). As such, positioning is a natural extension of market segmentation and targeting with destinations constantly under review with regard to a myriad of factors that include destination attributes, price, competitor destinations and tourist type (Chacko and Marcell 2008).

With regard to a suitable process to implement positioning and re-positioning strategies, Lewis et al. (1995) advocate a five-stage procedure, namely: (i) determine the present position; (ii) determine what position you wish to occupy; (iii) ensure the product (or in this case destination) is truly different from the former position; (iv) undertake re-positioning strategy; (v) continue to measure if there is a position change in the desired direction. More specific to tourist destinations, Avraham and Ketter (2008, 2016) advocate the use of the "multi-step model for altering place image with destination image described as the general impression that a person, organization, or product presents to the public (Dinnie et al. 2010). Avraham and

Ketter also advocate the following use of three media strategy groups, namely: *source; audience; message*. With regard to the *source* sometimes it is necessary to actually change the source and actively encourage the media to visit the destination and proactively show them what is really going on and what the truthful position in the country is. This was evident in the study by Knott et al. (2013) as discussed earlier in the specific context of South Africa. Although the staging of the 2010 FIFA World Cup™ attracted a somewhat meagre 310,000 additional international visitors, more significant was the fact that it also attracted over 15,000 journalists from around the world and over 400 television broadcasters which generated over 200 viewing hours of football and in excess of 700 million people watching the final live on television; quite a platform for the re-positioning of a nation brand! In addition to the more traditional media, the use of social media (including YouTube, Google Street View, webcams and channels streaming live to show what is really going on) serve as very effective means to counter negative messaging and images. Such initiatives are intended to embolden audience *values, insights and beliefs* through the destination connecting or re-connecting with what the audience believes and what you as a destination wish for them to believe. *Message* strategies can also then be designed to contradict any negative perceptions or stereotypes about a destination and mitigate, limit or reduce the scale of the problem. In all situations, however, it is essential to be creative as so many other destinations are seeking to do the same thing.

Similarly, Inch and Bowden (2016) identify a three-stage process with regard to where (target market and competition) and how (differential advantage) destinations position themselves. In the case context of Brisbane, Australia, Inch and Bowden (2016) advocate positioning elements, positioning approaches and re-positioning strategies as the stages necessary for successful re-positioning to take place. The first, positioning elements, identifies the desired target market, the competitive frame of reference (i.e. specific competitor), points of difference (i.e. functional, hedonic and image attributes of a brand) and the desired criteria for the market to truly believe the re-positioning taking place. The second, positioning approaches, offers exclusive positioning whereby there is a different position for different target markets, concentrated positioning where the same positioning exists for one or more target markets, or uniform positioning strategies where place brands serve all the needs of the different markets. The final stage that of re-positioning strategies, offers a choice of three options consistent with the views of Kotler et al. (2005). The first, real positioning, takes place where there is an improvement and update with real attributes whereas the second, psychological re-positioning, involves a residual shift in beliefs about its key attributes to bring about a change in the destination's image. The final option that of competitive de-positioning, occurs where a destination seeks to change the position about other destinations by accentuating the negatives that they have to offer.

It is interesting to note that while the above are used widely in tourism policy and destination governance, in many instances they are used with their true meaning and reach seldom understood in full. Thus, many destinations adopt competitiveness strategies, and so called "master plans", without first fully scrutinizing their resource

base and their portfolio of tourism marketable services. Fast occurring scenario changes are likely to aggravate the problem, and result in obsolete strategies and governance. In essence, a destination's position in the market has a strong correlation to both its attractiveness and competitiveness in the world market (Kresic 2007). Attractiveness of a destination is controlled by various factors or elements that hold the greatest influence on a destination's tourism development and on the overall intensity of the tourism development. In fact, understanding the attractiveness factors of a destination is crucial in understanding the true position of a destination in the world market (Kresic 2007). This is so because understanding the attractiveness factors can bridge the gap between understanding the availability of tourism resources of a destination and conditions that dominate the markets that generate the tourism for a destination. In fact, understanding these concepts is necessary in evaluating whether there is actually the need to re-position and re-brand a destination, or to simply diversify the tourism products.

Similarly, many destinations misinterpret the need for tourism product diversification for destination re-branding. A primary example of this can be seen in Nemec-Rudez et al.'s (2014) research on visitor structure and destination re-positioning. Their study of Portoroz, a Northern Mediterranean destination shed light on the fact that many Northern Mediterranean destinations have witnessed a decline in tourism over the past decade. Arguably, however, Nemec-Rudez et al. (2014) attribute the decline in visitation to Destination Marketing Organizations (DMOs) insufficiently assessing the evolving trends of tourists. In this regard, it is safe to suggest that many declining destinations' re-positioning strategies lack sound market analysis as was apparent in the case of Portoroz's attempt to reposition itself in the market. The authors point out that as with many destinations, Portoroz's re-positioning efforts were not congruent with the structure of tourists attracted to the destination during the summer vacation season. What's more, the re-positioning efforts of Portoroz didn't actually re-position the destination at all. Rather, it simply diversified the tourism products of the destination and heightened the need for DMO's to understand the difference between actual destination re-positioning and more straightforward product diversification. Diversifying tourism products will not necessarily re-position a destination in the marketplace, as it will not change a brand image. Only by understanding the target markets, future trends, and consumer demands will a new destination brand image and position be possible in the world marketplace. This is now evidenced below with a comparison of two of the world's largest and most successful destinations, Orlando and Las Vegas.

14.4 Destination Re-positioning in Practice

14.4.1 Orlando and Las Vegas

With Orlando and Las Vegas attracting in excess of 66 million and 40 million respectively in 2015, their success in attracting visitors on a mass scale is unparalleled. However, their market positioning as the home of "family fun" (Orlando) and

“adult entertainment” (Las Vegas) has been challenged in recent years in response to a variety of macro-scenario changes which include, among others: financial crises and economic recession; demographic changes and shifting patterns of mobility; destination politics and governance; changing patterns of tourist behavior and consumption; and, the emergence and impact of the “sharing economy”. At the same time, both destinations continue to seek alternative, “non-tourism” models of growth as they aspire to be more balanced, healthy, vibrant and resilient destinations for both visitors and residents alike. Hence, in addition to a number of external macro-scenario changes both destinations are seeking to protect, strengthen and diversify their existing destination “positions” while at the same time navigating internal city pressures to broaden their “non-tourism” economic bases without damaging their touristic competitive advantages. Orlando and Las Vegas provide stimulating destination-specific case examples for this chapter in that both have traditionally had very clear and competitive positions in the marketplace.

Orlando is the single-most visited city in the United States with over 66 million visitors in 2015. The main driver of tourism to Orlando is the world-class theme parks: Walt Disney World, Universal Orlando Resort, and Sea World. What’s more, Orlando has diversified its tourism product to include conventions and events. From 2005–2015, Orlando re-positioned itself, as a destination that not only is the number one tourist and theme park destination, but also the number one event and convention destination, overtaking both Chicago and Las Vegas’ attendance numbers (Dineen 2015; Srinivas 2015). Orlando re-positioned itself in the market by transforming its “family only” image into one that is more consistent with a more diverse tourism product. This destination re-positioning was done by utilizing “adult-centric” products and events as catalysts, image-makers, and attractors. The result is a more encompassing tourism product and a less “family-dependent” one.

Las Vegas’s tourism industry, meanwhile, is dependent almost exclusively on casino gaming. As such, it is viewed almost entirely as “Sin-City”, an adult playground where “what happens in Vegas, stays in Vegas”. Unlike Orlando, Las Vegas has never really been viewed as a family destination. As a result, it suffers greatly from niche tourism; although its hold on this market is incredibly strong and generates significant revenue (Ro et al. 2013). Although Las Vegas offers a diverse tourism product, encompassing many different areas including gaming, lodging, entertainment, tourism, and conventions, virtually all of them are linked in some capacity as gaming and live entertainment take place in the lodging establishments, while the convention center is located just off of the strip of casinos that Las Vegas is so famous for. Hence, although the major tourism product in Las Vegas is gaming, those sectors of the tourism market the DMO are targeting hardest are the family and convention markets. The reason being, Las Vegas is trying to re-position itself as a legitimate destination that is made up of more than just casinos and large resorts. Unfortunately, casinos make up the vast majority of the revenues generated and so the challenges are immense in re-positioning it as a destination where gaming is not the first perceived image of potential visitors.

Between the two cities, it is arguably easier for Orlando to overcome the family image than it is for Las Vegas to overcome the adult playground image for many

reasons. Firstly, Orlando is home to Walt Disney World, Universal Orlando, SeaWorld, and the new I-Drive 360. These all cater to different markets, overall, and attract different types of visitors. Walt Disney World has always been plagued by the image of it being a haven for little children and families; however, the development of more adult-friendly attractions, high-end venues, and their acquisition of a more diverse portfolio of brands will help Disney re-position their brand and Orlando as a tourist destination. What is more, knowing that Orlando is considered a family destination, the DMO Visit Orlando has spent millions of dollars marketing Orlando as a destination encompassing all of Central Florida, not just the city limits. Instead of simply promoting Walt Disney World and the themed attractions of Orlando, the DMO targets those seeking conventions and events, space exploration, natural beauty, and cultural immersion. They work hand in hand with both the local attractions and the local government to promote and attract future guests in conjunction with trends in the world tourism marketplace.

14.4.2 Organizing for Successful Re-positioning

The case of Orlando is particularly noteworthy as it is more common for cities to re-position toward service-based economies (Insch and Bowden 2016). In this regard, Orlando is very different in that it is using its strength of positioning in tourism to re-position to a particular target market to boost its inward investment, hi-tech, medical and manufacturing base and become a top-tier US city. Partly driven by its low-income per-head-of-population status due to the sheer scale of its tourism and hospitality sector, the Orlando Economic Development Commission has recently launched the “Orlando – You Don’t Know the Half of It” campaign. Designed as an *exclusive positioning* strategy so as not to negatively impact its highly successful tourism destination positioning, the *positioning element* of the campaign targets key industry players, decision-makers and relocation experts with a very clear message that there is more to Orlando than simply theme parks and tourists. The greater metropolitan area around Orlando is currently one of the fastest growing in the US with a very young, educated and dynamic workforce. As such, this *psychological re-positioning* campaign is a deliberate attempt to stimulate urban transformation through a shift in the beliefs of those who previously had a monoview of the city and its attributes. It is interesting to note that the “Orlando – You Don’t Know the Half of It” campaign had an innovative creative thread to it in that it used its powerful tourism-related attributes to connect with its non-tourism desired markets. For example, “*Fantasy*, meets reality”, “Our home is more than our *castle*” and “Not just *characters*, but character” were some of the combination of theme-park attributes associated to a broader industrial message to generate 13% more jobs, 20% higher wages and 41% growth in new-to-market jobs.

Underpinning Orlando’s re-positioning campaign was a concerted collaborative effort and a proactive approach to clusters and cluster development. This approach is consistent with that advocated by Van den berg et al. (2001) in that urban economic

growth is frequently generated through collaboration among various economic actors who come together and form innovative cluster arrangements of firms and organizations. This is particularly effective in geographically-concentrated areas and is that approach adopted by Orlando with clusters focused in and around the city in the form of medical, hi-tech and advanced manufacturing, aerospace and defense, life sciences and biotechnology, modeling, simulation and training, digital media, performing arts and culture, sport and educational clusters. Together, these clusters are driven by actors within the Orlando area cognizant of the key challenges and opportunities faced by the destination and the required experience, connections and channels with which to stimulate action and essentially “get things done”. The “jewel in the crown” and that cluster which perhaps best fits with the psychological re-positioning message is that of Orlando’s Medical City at Lake Nona, a \$2 billion medical cluster of national and international standing. Although still early in its stage of development and impact, the recent decision by the US Tennis Association to relocate to Orlando and become a neighbor of these world-class medical facilities is testament to the effectiveness of the re-positioning strategy, shifting Orlando’s focus away from its more traditional hedonistic attractions to a desired target market that will provide a greater balance to Orlando’s economy.

14.5 Conclusion

Looking to the future, the previous example of Orlando represents a case of good practice in that not only did the re-positioning strategy feature a creative nationwide campaign but it also was built upon real foundations and infrastructural change that gave the campaign credibility and believability. This is important as historically, many such campaigns have been superficial in their delivery with words, images and logos not supported by action on the ground. One of the challenges facing all destinations irrespective of size and type is that change is continuous with their being a bigger threat than ever of destinations suffering from complacency either due to an unwillingness or inability to face change (Minghetti 2001). This continuity of change and sense of impatience in the market is driven, in part, by social media and the instantaneous culture that now pervades not just the Millennials but all generations to some degree. This, combined with the changing perceptions of international markets, most notably China and Russia, adds to the frequency with which destinations need to revisit, and possibly adjust, their positioning in the eyes of the market.

One stakeholder group that is increasing its salience in destinations is that of the local host community (i.e. residents), with the tourist saturation of many well-known destinations such as Venice, Amsterdam and Barcelona adopting a more holistic and integrated approach to the marketing, management and positioning of destinations for both residents and visitors. For destinations to remain sustainable it is imperative that all stakeholders, and especially local residents, benefit from such a change in positioning with economic gain, safety and overall quality of life critical attributes to success.

In conclusion, there will always remain the question as to do destinations appeal to one, highly-focused market, or do they broaden their appeal and connect with others albeit without risking the alienation of diluting the essence of your core positioning? Perhaps even more challenging for destinations is how in the future they will be able to manage the collective opportunities and threats of “real” and “virtual” positioning as augmented and virtual reality permeate the destination landscape and add to the complexity of the marketing, management and positioning of tourist destinations.

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