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Procedia - Social and Behavioral Sciences 175 (2015) 393 – 400

Procedia

Social and Behavioral Sciences

International Conference on Strategic Innovative Marketing, IC-SIM 2014, September 1-4, 2014,
Madrid, Spain

Invigorating the Destination's Marketing Strategy? (The Case of Slovakia)

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Abstract

The paper describes how the lack of tourism marketing strategy may result in a reduction in the number of both, foreign and domestic visitors to the destination. It defines tourism destinations; characterizes the principles of marketing strategy development and its role in competitiveness of the destination. Slovakia possesses a large number of inherited or created assets, but it has not been able to realise its full potential in tourism development in the new millennium. The paper compares Slovakia's, the Czech Republic's, and Austria's results in the development of the domestic and foreign tourism market. The destinations were subject to research using secondary data to identify tourism products and analyse time series of selected data in the tourism markets. The results were subjected to evaluation using the Spearman's correlation coefficient to measure the strength of dependence between the development of the domestic and foreign market in each destination. Based on the results of the analysis, recommendations for the development of invigorating marketing strategy are formulated.

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Peer-review under responsibility of I-DAS- Institute for the Dissemination of Arts and Science.

Keywords: *tourism; destination; marketing; strategy; domestic market; foreign market, governance*

1. Introduction

Tourism is one of the most important sectors of the world economy; its direct contribution equates to US\$2,155.4 billion (2.9% of total GDP) of total economy GDP while its total contribution to GDP was US\$6,990.3

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billion (9.5% of GDP). In 2013 tourism directly supported 100,894,000 jobs (3.4% of total employment); the total contribution of the sector to employment, including jobs indirectly supported was 265,855,000 jobs (8.9% of total employment). The WTTC (2014) forecasts an annual growth of 3.1% in direct tourism contribution to GDP and 10.3% in the total contribution to GDP for the period from 2014 to 2024.

Based on available statistics, Austria recorded during the same period only a slight decrease in the number of guests and overnight stays and its revenue rose by 3%. More than 120 million overnights, the balance of tourism reaching ten billion Euros, and 700 thousand jobs in tourism in Austria show that the development, implementation and long-term, purposeful promotion of the tourism marketing strategy and a systematic approach to tourism as an economic phenomenon are crucial. The example from Austria suggests that Slovakia could benefit from a marketing strategy that would bring satisfaction through visitor demand, appreciation of the tourism offers and significantly economic benefits for the economy of the destination.

The main objective of this paper is to point out the potential contribution of the marketing strategy to the development of tourism and its subsequent positive effect on the national economy.

First we characterize the theoretical results of research in terms of destination management, competitiveness, and marketing. Then we explain the methodology of research. Research will focus on key data on products and markets in Austria, the Czech Republic and Slovakia. This information will be assessed in the context of underdevelopment of tourism in the Czech Republic and Slovakia. The reason is the lack of a systematic approach to tourism and tourism marketing from the viewpoint of tourism marketing invigoration.

2. Theory

2.1 Tourism Destination and Competitiveness

Destinations offer an integrated experience to the visitor and traditionally, are defined as territories, geographical areas, such as a country, an island or town (Davidson & Maitland, 2000), with political and legislative framework for tourism marketing and planning. Destinations are places towards which people travel and where they choose to stay for a certain period (Leiper, 1995) and can be recognized as a perceptual concept, interpreted subjectively by visitors, where a combination of all products, services and experiences are provided locally (Buhalis, 2000). Destinations are also considered as geographical region understood by visitors as a unique entity where facilities and services are designed to meet the needs of the visitors (Cooper, Fletcher, Gilbert, Shepherd & Wanhill, 1998).

The success of the destination in the tourism market depends on the ability to develop a successful and competitive marketing strategy. Marketing strategy is a reflection of activities the destination management will evolve on the selected tourism market and what tools to achieve these objectives will exploit.

Competitiveness is widely accepted as the most important factor determining the long-term success of destinations (Kozak & Rimmington, 1999). To be successfully promoted in the targeted markets, a destination must be favourably differentiated from its competitors.

Today's visitors have a large selection of destinations to choose from, but less time to make a buying decision. The development and increasing use of information and communication technologies have radically changed the relationship between the destinations and visitors. Accessibility of different information means that destinations must reckon with the fact that the competition can quickly react on every change in their strategy.

The most comprehensive work on tourism destination competitiveness was undertaken by Crouch and Ritchie (Crouch & Ritchie, 1994, 1999; Ritchie & Crouch, 2000, 2003), various empirical studies were based on their conceptual framework (d'Hartesse, 2000; Go & Govers, 2000; Kim, Guo & Agrusa 2005). Number of other studies focused on a particular dimension or a particular sector of tourism, such as Bueno (1999), Cizmar and Seric (1999), Hassan (2000), Osmanagic-Bedenik (1999), Pechlaner (1999), Prideaux (2000) or Dwyer, Forsyth, and Rao (2000).

Competitiveness refers to the combination of both assets and processes where assets are inherited or created and transformed into economic results (Crouch & Ritchie, 1999). A number of studies focused on the concept of competitiveness in the destinations (Crouch & Ritchie, 1999; Go & Govers, 2000; Hassan, 2000); most of them were investigating how destination competitiveness can be sustained and enhanced while maintaining a market position among other destination competitors. Destination's competitiveness is defined by Hassan (2000) as the ability of the destination to create value-added products that sustain destination's resources while maintaining its market position (Hassan, 2000). Ritchie & Crouch (2000) state destination's competitiveness as the ability of the

destination to create added value and thus increases national wealth. Ritchie and Crouch (2003) considered a destination competitive if it can increase tourism expenditure and increasingly to attract visitors by offering them satisfying, memorable experiences. They focus on long-term prosperity of the destination and claim that the most competitive destination is that which most effectively creates well-being for its residents on a sustainable basis and underline the importance of economic, ecologic, social, cultural and political sustainability. Competitiveness has incorporated the concept of competitive development strategies (Bordas, 1994; Poon, 1994). A number of studies point out that tourism destination competitiveness can be enhanced through development of marketing strategies. Smeral and Witt (2002) state that evaluation of the overall competitiveness of the destination in the global tourism market should form a solid basis for optimizing allocation of funds and the creation of marketing strategies.

2.2 Marketing Strategy

Marketing strategy is a reflection of activities and tools the destination management will develop to achieve the objectives on the selected tourism market (Choo, 1999).

Kotler (2004) defines marketing strategy as a set of principles for adapting marketing concepts to changed circumstances. Thus defined marketing strategy complies with the conditions in tourism destinations. Tourism market is dynamic and subject to many changes, from which some of the most important are seasonality and trendiness.

Basic purpose of the strategy is to increase destination competitiveness (Evans, Fox & Johnson, 1995). The success of a destination depends on its future orientation and alignment of the corresponding resources with the opportunities offered by the external environment.

De Wit and Meyer (2010) stress that the strategy is a three-dimensional concept: (1) strategy process, (2) strategy content, and (3) strategy context. The three dimensions are interacting with each other, and if these relationships are neglected, a complete insight in the subject of strategy will not be reached. The way the strategy process is structured is crucial for the result of the strategy content, and the content of the current strategy is crucial for the strategy process in the future.

The strategy implementation process usually receives, according to Bourgeois (1980), little attention but an implementation can make or break a strategic decision; it can make a great strategic decision ineffective and at the other hand it can make a debatable strategy successful (De Wit & Meyer, 2010).

The success of a destination in terms of satisfaction, the visitor, is a function of several interdependent components; this underscores the need for strategic and integrated planning, together with the selective use of specific tools and techniques. The development of a strategic tourism plan for a destination is an articulation of the strategic priorities and direction that have been identified by stakeholders for the planning, development, management and marketing of a destination. A strategic plan for destination management is essential for the long-term success and sustainability of a destination. While having a strategic plan for tourism will not solve all of the destination's challenges, not having a strategic direction will certainly cause more issues in the future.

A fragmented industry consists of many small organizations with a characteristic feature that none of the organizations holds a significant market share. In such a market, there is no leader who would fundamentally set the rules of competition.

For example, business in hospitality and restaurant and catering services are considered typical fields in which the strategies of a fragmented industry are applied. A strategy is a strategy not only from the point of view of a business subject but also the industry as a whole (Beritelli, 2011; Buhalis 2000; Beritelli, Bieger & Laesser 2007).

The theoretical foundations for destination governance present a rather indefinite picture. There are still questions of governance to be defined, from the attempt to define the term 'destination governance' to the identification of types of governance models to research based on theories relating to various forms and problems of governance (Pechlaner, Raich, & Beritelli, 2010).

And this is also deciding point of view and question by invigorating the destination's marketing strategy in Slovakia and Czech Republic. Slovak and Czech tourism are since the velvet revolution under strong competitive pressure of traditional summer sea destinations and also the traditional European, destination Austria with developed organisational structures and large marketing activities. To be successful in European, and international market Slovakia and the Czech Republic must not only develop innovative destination's marketing strategy, but also create an effective system of destination governance at national, regional and local level. Austria is for both countries a positive example with a long tradition in international tourism and developed structure of financing and organisation

of tourism. The synergy in tourism and the use of information and communication technologies support the success (Kavoura & Katsoni, 2013). Lack of strategy in domestic and international tourism in the Czech Republic and Slovak Republic in comparison with Austria is visible not only in presented data about tourism markets but in many time series from tourism sector since the end of central economy.

3. Methodology

Marketing strategies used in tourism are examined first to reach the objective of the paper. Further on, the tourism products and time series of selected data in Slovakia, the Czech Republic, and Austria are analysed. In the last years, analysis and comparison of selected data from the viewpoint of their interdependence were not frequently used by authors thus the tourism market development could be seen only from specific research of national tourism data.

To evaluate the dependence between the domestic and foreign markets time series of data and Spearman's correlation coefficient is used. Spearman's correlation coefficient measures the strength of dependence between two or serial quantitative characters; in this paper the development of the domestic and foreign market is measured. The size of the coefficient can take values from the interval between $-1, 1$; if the coefficient is closer to -1 , the correlation is negative; coefficient closer to 1 means positive correlation. Spearman's correlation coefficient is a measure of a monotonic relationship and thus the value of the coefficient equal to 0 do not imply there is no relationship between the variables.

$$r_s = \frac{\sum_{i=1}^n (r_i - \bar{r})(s_i - \bar{s})}{\sqrt{\sum_{i=1}^n (r_i - \bar{r})^2 \sum_{i=1}^n (s_i - \bar{s})^2}} \quad (1)$$

where

r is the order of character A

s is the order of character B

n is the number of monitored characters

4. Calculation, Results and Discussion

In the conditions of tourism development in Slovakia, a cost leadership strategy is neither perspective nor sustainable from the point of view of the country. The reason is the fragmented tourism market and high-market share required for this strategy; currently, Slovakia does not reach this requirement.

An example of a successful differentiation strategy in tourism can be found in Austria that based its long-term success in the international tourism market on the supply of a differentiated product for selected market segments. The product has a strong quality component and Austria, and its regions are the brand which is difficult to imitate. In the case Slovakia would be attempted to apply the differentiation strategy, high investments would be required, and the result of this attempt would be ambiguous.

Slovakia as a specialised tourism producer can compete in global tourism market only in some segments. For selected segments of inbound tourism, it is suitable to apply a focused strategy based on product specialisation about these segments. In practice, it would mean focusing on selected regions and target groups of visitors, e.g. seniors.

In recent decades, Slovakia is an example of how it is possible to waste the potential of tourism development with a direct impact on the economy and employment. The country has no tourism development strategy, and this situation is redoubled by not respecting the product-market matrix since new markets were not looked for and the old ones, stabilized, were let tumble.

From the product-market matrix point of view, the first step is to compare products. For the comparison of the

product base and the visitor group Austria and the Czech Republic was chosen because of two factors: (1) similarity of the provided products and (2) similarity of visitor target groups (MDVRR SR 2013; MMR CR, 2013; AFECH, 2013). The impact of the world economic crisis on the numbers of accommodated visitors and overnight stays as a significant impact factor with a radically different progress was compared.

Table 1. Comparison of tourism products in Slovakia, Austria and the Czech Republic from the product-market matrix point of view

Slovakia's tourism products	Czech Republic's tourism products	Austria's tourism products
Winter and summer mountain holidays	Summer and winter mountain holiday	Activity holiday
Ski holiday	Ski holiday	Ski holiday
Recovery holiday	Rural holiday	Recovery holiday
Family holiday	Sport and activity tourism	Family holiday
Walking, hiking	MICE	Walking, hiking
Sightseeing tours	Walking, hiking	Sightseeing tours
Stay at the spa	Cycling	Spa holiday
Cultural events visit	Spa holiday	Cultural holiday
Participation in various events	Cultural holiday	Participation in various events
Wellness and Beauty holiday	Wellness and Beauty holiday	Wellness and Beauty holiday
City break	City break	City break

All, Slovakia, Austria, and the Czech Republic have similar products connected with a different primary and secondary offer conditioned by the geographic location. These are mainly winter and summer mountain holidays, spa stays, taking part in cultural events, wellness holiday, and city breaks.

Tables 2 to 4 include data on the number of overnight stays in Slovakia, Austria, and the Czech Republic (AFECH, 2013; CSO, 2013). These data are interesting in the context of the crisis development, when Austria recorded only a slight decrease, or even an increase of domestic tourism.

Table 2: Number of overnight stays from selected countries in Slovakia in the years 2005 to 2013 in thousand stays

Visitors/ Year	2005	2006	2007	2008	2009	2010	2011	2012	2013
Austria	172	173	163	159	123	121	126	136	150
Czech Republic	1 375	1 515	1 611	1 705	1 301	1 350	1 423	1 413	1 387
Germany	1 005	894	778	682	528	491	463	444	467
Hungary	322	327	248	225	137	120	144	132	142
Poland	608	720	763	942	480	453	471	441	443
Total of foreign countries	4 872	5 134	5 199	5 261	3 769	3 807	4 039	4 101	4 340
Slovakia	5 861	6 004	6 368	7 203	6 622	6 560	6 486	6 807	7 147
Total of visitors	10 733	11 138	11 567	12 464	10 391	10 367	10 525	10 908	11 487

The latest value for International tourism, receipts (in US\$) in Slovak Republic was \$2,514,000,000 as of 2011. Over the past 16 years, the value for this indicator has fluctuated between \$3,004,000,000 in 2008 and \$441,000,000 in 2000. The value for International tourism, number of arrivals in Slovak Republic was 1,460,000 as of 2011. Over the past 16 years this indicator reached a maximum value of 1,767,000 in 2008 and a minimum value of 814,000 in 1997 (Index Mundi, 2012).

The success of Slovakia based on the booming growth till the year 2008 disappeared due to the incoming crisis, and the number of visitors and overnight stays from key source markets declined by dozens of percent. The year 2009 meant a return to the level of the year 2005, and in the case of Hungary, the decline was much higher. It is striking that the German market had begun to crumble long before the introduction of the Euro and in 2009, it reached 68% of the number of visitors and 52% of overnight stays in 2005.

The development of the Slovak tourism market is also connected with the development of the domestic markets, tourism strategy, tourism policy and the use of effective methods in the management of tourism growth. Tourism in Slovakia is suffering from the lacking long-term and sustainable policy. The result of this development is uneven development of the domestic and foreign tourism markets. The correlation coefficient (number of domestic and foreign visitors) is 0.381 and p-value 0.351. It means that the development in tourism in Slovakia and its main source markets is not a result of a coherent tourism policy. It is only a result of the economic boom and the crisis in the last years.

Table 3. Number of overnights from selected countries in the Czech Republic 2005 – 2013

Country/Year	2005	2006	2007	2008	2009	2010	2011	2012	2013
Austria	390	364	358	358	364	392	380	408	414
Germany	5 888	6 055	5 635	5 291	4 852	4 610	4 578	4 601	4 404
Hungary	261	212	232	230	192	230	238	234	215
Poland	557	610	651	786	718	739	777	779	800
Slovakia	760	806	871	656	582	621	683	762	774
Total of foreign countries	19 595	20 090	20 610	19 987	17 747	18 366	19 425	21 794	22 145
Czech Republic	20 725	21 357	20 221	19 296	18 915	18 543	18 810	19 045	18 596
Total	40 320	41 448	40 831	39 283	36 662	36 909	38 235	40 839	40 741

The latest value for international tourism, receipts (current US\$) in Czech Republic was \$8,462,000,000 as of 2011. Over the past 19 years, the value for this indicator has fluctuated between \$8,871,000,000 in 2008 and \$2,880,000,000 in 1995. The value for International tourism, number of arrivals in Czech Republic was 8,775,000 as of 2011. Over the past eight years this indicator reached a maximum value of 10,162,000 in 2007 and a minimum value of 7,641,000 in 2003 (Index Mundi, 2012).

Table 4. Number of overnight stays from selected countries in Austria in the years 2005 to 2013 in thousand overnights and in %

Visitors/Year	2005	2006	2007	2008	2009	2010	2011	2012	2013
Czech Republic	1 133	1 236	1 390	1 779	1 955	1 972	2 079	2 124	2 150
Germany	51 028	48 763	48 139	50 144	48 857	48 155	47 390	49 606	50 823
Hungary	1 296	1 398	1 511	1 642	1 499	1 510	1 598	1 624	1 622
Poland	820	894	1 037	1 389	1 386	1 423	1 519	1 479	1 496
Slovakia	232	262	295	389	424	465	499	525	557
Total of foreign countries	87 741	87 238	88 400	92 840	89 864	89 857	90 706	95 052	96 874
Austria	31 501	32 120	32 994	33 879	34 443	35 023	35 297	35 964	35 754
Total of visitors	119 242	119 358	121 394	126 719	124 307	124 880	126 003	131 016	132 628

The latest value for International tourism, receipts (in US\$) in Austria was \$22,432,000,000 as of 2011. Over the past 16 years, the value for this indicator has fluctuated between \$24,346,000,000 in 2008 and \$11,382,000,000 in 2000. The value for International tourism, number of arrivals in Austria was 23,012,000 as of 2011. Over the past 16

years this indicator reached a maximum value of 23,012,000 in 2011 and a minimum value of 16,647,000 in 1997 (Index Mundi, 2012).

There is a strong dependence and correlation between the domestic and foreign markets in Austria. In the last eight years, both show a similar growing trend. The correlation coefficient (number of domestic and foreign visitors) is 0.976 and p-value only 0.00003314. It means a strong dependence between the growth of the domestic and foreign markets and success of the tourism policy.

Austria focused its effort in tourism on gradual implementation of market entry strategies, continuous product development strategies, and market development strategies by using the product-market matrix. On the basis of a long-term market evaluation, it aimed at the supply of existing products, which were innovated progressively and developed for existing groups. It focused mainly on sustainable domestic tourism; the losses from the German market were replaced by the accessions from the markets of the surrounding central and East European countries. The gradual decline in the number of visitors and overnight stays from Germany is a long-term phenomenon for Austria. Therefore, since the beginning of the 90-ties of the 20th century, it has focused on the surrounding markets, knowing that their purchasing power will grow.

There is emerging a question why Austria did not experience a similar decrease as Slovakia due to the weakening of national currencies in 2009. A possible answer can be that its growth was not based on the boom, but on a long-term strategy and that the introduction of the Euro in Slovakia fully revealed an excessive price level in proportion to the quality of the provided services.

5. Conclusion

The paper has brought insight into the state of tourism in Slovakia, Austria, and the Czech Republic based on a comparison of data on their products and markets. It pays attention also to the turbulent period of the crisis, which had almost no impact on Austria's tourism; however, Slovakia's tourism was hit largely. This fact points to the need for the creation, development and promotion of a purposeful tourism development strategy that will bring Slovakia and Czech Republic back to the desired competitive position.

The analysis of the presented data has revealed that in the past few years, Slovakia and the Czech Republic have relied too much on the booming trend in the economy and has not made much effort to develop marketing strategies at the national and regional level. Both countries need also to understand that synergies in tourism can be created among the interested parties involved and the use of information and communication technologies which may contribute towards to this end. The product-market matrix points to the need to strengthen and innovation the existing products so that they respect the tourism trends, and to focus on the markets where Slovakia and Czech Republic can be a differentiator.

Slovakia and the Czech Republic have a significant growth potential in the given markets, considering the numbers of visitors and overnight stays from Germany in Austria. Moreover, Slovakia, Austria and the Czech Republic have some common target markets, such as Russia, Ukraine, Italy, and the United Kingdom, which can play a significant role in the number of visitors and overnight stays. It depends on Slovakia and the Czech Republic how it will use these market opportunities. But it will not be possible without functioning and mutually consistent marketing strategies at the national level.

Acknowledgements

The contribution is part of the scientific project granted by VEGA 1/0810/13/ Preconditions for applying the concept of socially responsible behaviour in tourism.

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