

TOURISM VERSUS THE VISITOR ECONOMY AND THE SHIFTING LANDSCAPE OF DESTINATION MANAGEMENT

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This paper attempts to explore the emerging concept of the visitor economy, by linking it to recent changes in tourism governance on a destination level, influenced by complex global and regional politico-economic factors. A regional outlook reflecting on England as an exemplar of a shifting destination management is introduced and provides the basis of investigation. Particular attention is given to the new model of destination management in England and its prospective role in realising the benefits of the emerging visitor economy. Secondary data sources in the form of destination management strategies and industry reports have been explored and informed the discussion of the two evolving concepts – destination management on a local level and the multifaceted visitor economy. Outcomes of the analysis suggest that further enquiry into the blurred visitor economy concept is imperative, particularly in times of organisational restructuring, changing destination management priorities and increased competition..

Keywords: *Visitor economy; Destination Management Organisations; Economic impacts, England*

JEL Classification: *L83, M1, O1*

INTRODUCTION

In its 2009 Travel & Tourism Competitiveness Report, the World Economic Forum held in Geneva, Switzerland recognised tourism as being a critical economic sector worldwide, despite the current difficulties of political and economic nature driving change in the industry (World Economic Forum, 2009). In the United Kingdom, tourism has been an important for the economy of England, which is the single largest nation within the UK and major recipient of tourism and visitor-related activities (Penrose, 2011). In this sense, a 2009 study completed by Deloitte,



revealed that UK tourism delivers a significant direct contribution to the economy - £52bn or 3.7 per cent of the GDP, with a total direct and indirect contribution to the visitor economy of £114bn or 8.2 per cent (Kyriakidis *et al.*, 2009). The latter implied that contemporary tourism aims to capture direct, indirect, as well as induced contribution and bring attention to the raising importance of visitors within a destination. Thus, start making use of a new approach to understanding the wider benefits of the industry, namely the visitor economy.

A few years later, during the 2012 and 2013 Visitor Economy Forums held in London, this new approach was seen as a fundamental to England - the most successful tourism destination in the United Kingdom with direct and indirect contribution of £97bn, employing over 2m people and supporting thousands of businesses (VisitEngland, 2013). In addition to that, the visitor economy in England had a strong, interdependent relationship with a range of economic sectors, including transport, retail, sports, museums and arts (VisitEngland, 2013). Indeed, the visitor economy was seen as one of the fastest growing sectors of England's economy (McEvoy *et al.*, 2006) yet, being relatively unexplored.

Recent cuts in government funding for tourism and the introduction of the new 2011 UK Government's Tourism Policy, however, led to restructuring of the landscape of the sector's governance in England (Coles, Dinan and Hutchison, 2012). A consequence of that was a transformation of regional tourism bodies and their supporting governmental structures. The introduction of refocused, local as opposed to regional, tourism bodies was seen as an indication of adopting a more inclusive approach to destinations, taking into consideration local communities, businesses, and organisations, which are not directly involved in the delivery of solely tourism products and services. They, however, have been having an important tourism-supporting role for England (Penrose, 2011). Clearly these indirect, supportive determinants can be linked to the emerging visitor economy concept.

As the United Kingdom has a strong domestic supply chain, opportunities for absorbing indirect economic benefits are genuinely higher (Kyriakidis *et al.*, 2009). It is then vital for new destination management structures to capture this opportunity and realise the broader impacts of tourism. Often, tourism and the visitor economy have been used interchangeably. They, however, reflect on two different concepts.

Consequently, the objectives of this paper are:

A) To shed light on the two contrasting concepts being at the centre of discourse, namely tourism and the visitor economy;

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B) To examine the evolving relationship between the emerging visitor economy and the changing landscape of destination management in regional frameworks.

THE CHANGING TOURISM AND ITS PLACE IN THE VISITOR ECONOMY

Tourism is a contemporary phenomenon (Buhalis, 2000; Urry, 2002; Ritchie and Crouch, 2003; Cooper and Hall, 2008), which has been attracting great attention by both scholars and practitioners. Traditionally, tourism can be linked to those sectors, which directly service and engage with tourists, such as attractions, airlines, hotels (Balding *et al.*, 2012). A plethora of definitions reflecting upon the concept of tourism is available and probably the most accepted one is that of the United Nations World Tourism Organisation (UNWTO). In a classic definition of the concept of tourism, the then World Tourism Organisation (WTO) argued, that:

“Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited” (WTO, 1995: 1).

The latest definition of tourism by the now United Nations World Tourism Organisation (UNWTO), however, reflected a more holistic, inclusive approach to the way tourism should be seen, thus being:

“... social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure ... as such, tourism has implications on the economy ... wide spectrum of stakeholders are involved or affected by tourism” (UNWTO, 2010: 1).

The former definition reflects a generic interpretation of tourism emphasising on the traveller, residing outside his/her usual working and living environment. Whereas the latter definition provided by the UNWTO encompasses a much more integrated approach to the industry and its scope, taking into consideration impacts of socio-cultural, environmental and economic dimensions as a consequence of the movement of people.

In other words, if the classic statement drew attention to the activity of being a tourist, the latest one emphasised on and aimed to capture the

impacts of this activity. Thus tourism industry was presented as a driver of economic development. Attention was importantly given to the emerging view that all tourists are now labelled as visitors (although significant part of them captured tourists). Issues of stakeholder inclusion and collaboration were also identified as important. This is so as nowadays, the industry comprises of a large number of predominantly Small and Medium-sized Enterprises (SMEs).

The blurred concept of the visitor economy, in contrast, lacks general definition. A few scholars, practitioners and industry organisations have attempted to define the term (Reddy, 2006; Kyriakidis *et al.*, 2009; McEvoy *et al.*, 2006; Balding *et al.*, 2012; VisitEngland, 2013). At the core of the visitor economy lays the economic activity of visitors (Reddy, 2006). This should capture all visitors within a destination – whether tourists or not (Cheshire East Council, 2011). It takes into account all the elements that make for a successful visitor destination, namely the broad range of factors attracting tourists (natural and built attractions; culture and heritage), the tourism-supporting infrastructure that helps shape the sense of place and improves accessibility, as well as the services that cater for the needs of visitors (and residents) - all being vital for the broader visitor economy (Reddy, 2006). Arguably, the new concept is much broader than ‘tourism and events’ (Balding *et al.*, 2012), and encapsulates an extensive portfolio of businesses – predominantly SMEs (OECD, 2012) that benefit from direct and indirect economic activity.

Kyriakidis *et al.* (2009) asserted that the visitor economy captures two key components. The core component reflects the direct contribution of tourism, thus being the value generated by the provision of tourism-related services and products (Kyriakidis *et al.*, 2009). This element can be linked to the well-established concept of Tourism Satellite Accounts (TSA), provided by the UNWTO and recognised as the international standard to measure direct economic effects of tourism within an economy (Kemp and Nijhowne, 2004) and subsequently, put it against other industries, and even economies (EUROSTAT, 2002). The second broader element, in contrast, takes into account indirect contribution from other sectors of the economy – reliant on, or supporting tourism activity (Kyriakidis *et al.*, 2009). In addition to that, the impact of capital investment and collective government expenditure, which is linked to the visitor economy, is also being incorporated in this wider concept (Balding *et al.*, 2012). Balding *et al.* (2012) have attempted to provide a definition of the visitor economy, which:

“... takes into account broader economic activity than has been historically defined as tourism and events. It encompasses the direct and indirect contributions to the economy resulting from a visitor travelling outside their usual environment for holiday, leisure and events and festivals, business, conventions and exhibitions, education, to visit friends and relatives and for employment ... in other words, the full value chain of the visitor economy is being accounted for “ (Balding *et al.*, 2012: 6).

The latter implied that the visitor economy goes well beyond impacting solely tourism-related organisations. It is accountable for regeneration through enhancing the image of a destination, turning a location into a commodity and subsequently, attracting commercial investment from outside the tourism industry (Bull, 2013; Cheshire East Council, 2011). The latter being one of many examples of how the visitor economy can impact the wider business environment.

In a regional perspective, the visitor economy is of paramount importance to some of England's nine regions. An example here is England's Northwest, where day visits make up 90 per cent of the regional visitor economy (McEvoy *et al.*, 2006), and Cheshire East, where day visitors account for 84 per cent (Cheshire East Council, 2011) of all tourism and visitor receipts. Hence a more inclusive approach to the underpinned concept and its various components is needed, particularly in destinations where day visitors dominate as opposed to tourists staying overnight. As outlined above, the term visitor economy does not have an accepted, universal definition, despite the fact that it has been widely used by business, governmental and third sector organisations in recent years (Reddy, 2006).

Having explored key interpretations of tourism and the visitor economy, it can be concluded that they are two different, but complementary concepts. If tourism takes into account planned journeys involving overnight stay (McEvoy *et al.*, 2006), the visitor economy adds to it by capturing the impact of visitors (including tourists staying overnight) over the local economy. Visitor contribution outreach direct, tourism-specific products and services as factoring in indirect, tourism-supportive determinants and agents, such as other sectors of the economy and the multiple parties through the tourism supply chain.

It can be argued, in addition, that the visitor economy reflects the recent transition in the way destinations are managed, particularly in the case of England where the new model of destination management (Penrose, 2011) was intended to bring together local communities, businesses and authorities to realise the benefits of visitor and tourism activity. Shifting destination management practices were intended to

deliver wider impacts being not just a result of tourists and tourism activity, but taking onboard visitors and indirect, supporting products and services. The changing landscape of tourism management in England thus reflects the broader concept of the visitor economy – subject to discussion in the following sections.

CURRENT SHIFTS IN DESTINATION MANAGEMENT

As in the case of the visitor economy, there is a considerable debate of what constitutes destination management (Harrill, 2009; Laesser and Beritelli, 2013) and what the functions of respective organisations, namely Destination Management Organisations (DMOs) are nowadays. It has been a common practice that the concept of DMO is more related to destination marketing, as opposed to management (Laesser and Beritelli, 2013). At times, destination marketing bodies may, however, undertake management duties under their remit. The latter creates a confusion of what the concept of destination management actually implies.

Destination management, as defined by UNWTO (2007) aimed to capture all the elements that make up a destination, such as attractions, amenities, transport and accessibility, marketing and pricing in a co-ordinated manner. A key responsibility of destination management then is to take strategic approach to connect these often very separate and different entities for a more efficient and effective management of the destination (Harrill, 2009). Duplication of resources and efforts, with respect to promotion, services, training, business support and others can be avoided through joined up destination management (UNWTO, 2007). Management and planning gaps that have not been addressed before could also be identified (Pike, 2004).

In other words, destination management seeks to balance interests among stakeholders in a defined physical area of tourism activity (Laesser and Beritelli, 2013), representing public, private and non-for-profit organisations (Polese and Minguzzi, 2009). The *2013 St Gallen Consensus on Destination Management* provided a contemporary, more process-based interpretation of what the concept of destination management should incorporate:

“Tourism destination management essentially equates to management processes that aim to attract visitors (tourists and same day travellers; ‘wallets’ and thus revenues), and allocate time and money in a specific geographic space (as defined by the visitors)” (Laesser and Beritelli, 2013: 47).

Two important notes should be made here drawing on the above interpretation of destination management. At first, St Gallen's definition reflects the shift in understanding and perceiving destination management, that is, management within an area of tourism activity, which importantly takes into account tourists, as well as day visitors – encompassing the broader visitor economy, as opposed to limiting it to the tourism industry solely.

Here, an emphasis is placed upon tourists, as well as same day travellers (or visitors). Tourists, defined as visitors who spend at least one night in a destination, but no more than one consecutive year (WTO, 1995) can be closely related to the notion of tourism. It can be argued that they directly contribute to the tourism industry. Same day travellers, in contrast, may be appropriately said to be aligned to the wider visitor economy. In this sense, all tourists are visitors, but not all visitors are tourists (Reddy, 2006; UNWTO, 2010). As previously outlined, the visitor economy also takes into account indirect contribution to tourism through supportive services and products, along with direct impacts over the tourism sector.

Secondly, Laesser and Beritelli (2013) brought attention to geographic spaces reflecting tourism areas defined by visitors. This is a key important, prevailing issue when considering today's management of destinations in England. Area of tourism activity is an idea that highlights the shift in the definition of tourism spaces, neglecting bureaucratic and administrative boundaries in favour of functional tourism territories. This statement is very much aligned to what the latest tourism policy in the UK advocates. Thus destination management should take into consideration functional tourism localities as defined by visitors and visitor activity (Penrose, 2011). Such definition of a tourism space can also be attached to the visitor economy concept as it takes into consideration wider set of individuals and organisations having an impact and being impacted by the industry, both directly and indirectly (Reddy, 2006), as opposed to abiding by existing arbitrary boundaries (Penrose, 2011).

Destination management has, in most cases been administered on either regional or local level (OECD, 2012). This certainly is the case of England where Regional Tourist Boards (RTBs) focused on regional scale tourism management and planning, are currently undergoing a transformation towards becoming DMOs (Hristov, 2013). The reshaped tourism management bodies are expected to carry out destination management and planning duties on a local level – in areas, where tourism and visitor activity occurs (Kennell and Chaperon, 2013).

The limited in many aspects concept of tourism and the emerging widespread visitor economy raises important questions. What will happen with the concept of tourism and, particularly now, when emerging destination management practices aim to adopt a more holistic, inclusive approach to English destinations. Will other English destinations follow the steps of Northwest in admitting the rapidly increasing importance of the visitor economy, and overlook the tourism as an industry? Are traditional models of destination management able to persuade the interests of all stakeholders within a destination? These are some of the questions deserving further attention.

ENGLISH TOURIST BOARDS

English Regional Tourist Boards (RTBs) reflected a popular and widely used structure of a public tourism body, which had a regional scope of operation. RTBs were concerned primarily with the selling of places – England’s destinations. These bodies were closely linked to the regionalisation of tourism in England, which was among the key objectives of the previous Labour Government (1997-2010) and reflected traditional DMO functions.

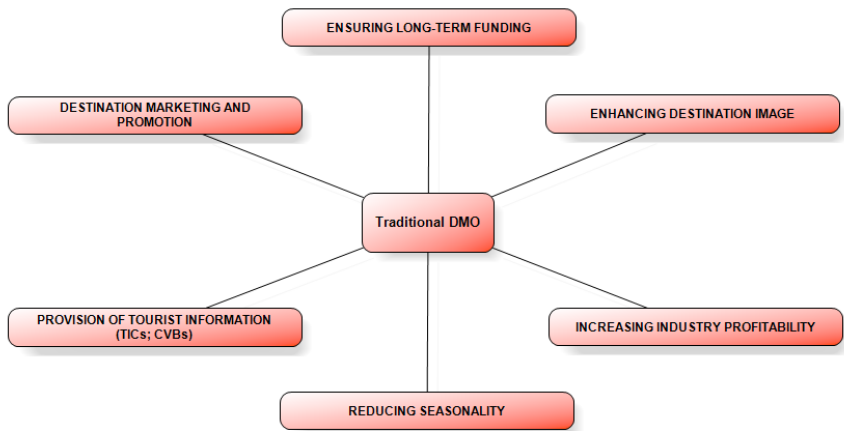


Figure 1. Traditional DMO Priorities and Objectives (Source: Pike, 2004; Harrill, 2009).

RTBs played an important role in the delivery of national government policy aspirations for tourism in England (Coles, Dinan and 226

Hutchison, 2012). These tourism bodies had existed since the Development of Tourism Act of 1969 and in early stages they were expected to lead on regional tourism strategy and its implementation (Coles, Dinan and Hutchison, 2012). RTBs had to work with Local Authorities (LAs), not just because they covered arbitrary boundaries with authorities (Coles, Dinan and Hutchison, 2012), but because they provided advice and expertise, shaped and delivered the destination brand, and targeted the right groups of visitors through appropriate promotional activity (Reddy, 2006). In addition, Tourist Boards had a role as a key interface with tourism industry businesses, particularly with those in the hospitality provision sub-sector (Reddy, 2006).

Due to their limited scope of operation, mainly focusing on marketing, promotion and information provision, former RTBs could be closely linked to tourism, as opposed to the visitor economy (see *Figure 1*), as the visitor economy takes into consideration the wider business environment, along with the multifaceted impact areas of tourism and visitor activity. Thus change in the way tourism in England was governed was called for.

CHANGING OPERATIONAL ENVIRONMENT AND PRIORITIES

Today's rapidly changing operational context requires change on an organisational level and various scholars and organisations have indicated that the landscape of tourism administration is altering and this process of transformation is a consequence of large to small scale influences taking place in local, regional, national, and even international contexts (Morgan, 2012; Cooper and Hall, 2008; Harrill, 2009; Laesser and Beritelli, 2013; Fyall, Fletcher and Spyriadis, 2009; Coles, Dinan and Hutchison, 2012; Bramwell, 2011; Kozak and Baloglu, 2011; UNWTO, 2010; Longjit and Pearce, 2013; OECD, 2013).

The recent changes in the English model of tourism governance can be well explained with the Global-Local Nexus (Milne and Ateljevic, 2001), which is a concept that attempts to formulate and theorise the complex links between the tourism and processes of economic development and failure. Spatially, the framework captures the way geo-political and global forces of economic change influence sub-national levels, such as regions and localities (Milne and Ateljevic, 2001). Applied in the context of England (*Figure 2*), it can be noted that on top is positioned the global economic downturn of 2008 having a direct impact on the UK Government cuts in funding, which subsequently affected public spending for tourism in England.

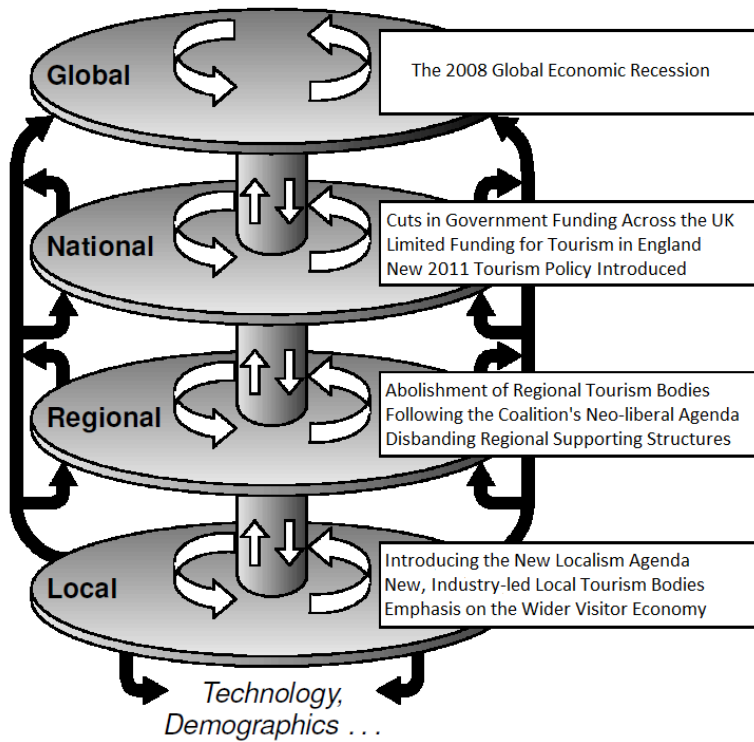


Figure 2. Global-Local Nexus in the Context of England (Adapted from Milne and Ateljevic, 2001)

The 2010 Coalition Government's neo-liberal agenda (*as shown on Figure 2*), which aimed to minimise the role and influence of the state in order to make the tourism industry more competitive is another key driver of change on regional and local level in England. Both events that took place on global and national levels influenced the restructuring of tourism governance in England implying a shift away from regions and emphasising on the less-visible localities (destinations).

Along with external, generic political and economic drivers of change, recent factors influencing shifts in the way tourism is managed and planned, lay within the industry itself. In its *Practical Guide to Tourism Destination Management*, UNWTO (2007) highlighted that

tourism governance is undergoing a transformation from traditional public sector model, historically delivering government policy, to one of a more corporate nature emphasising efficiency, return on investments, and the role of the market and partnerships between public, private and third sector entities.

Undoubtedly, one of the key catalysts of change is the increased international competition among destinations. Reddy (2006) indicated that the intensification of international competition challenged all countries when it comes to sustaining and enhancing their status as tourism destinations. The increased demand for active destination management is thus being emphasised. Drivers of change suggest that a more holistic approach to destination management is vital. An approach, that is not limited to capturing solely the voice of sectoral businesses and non-for-profit organisations. Instead, demanding increased responsibility and involvement of the wider set of advocates and beneficiaries of tourism. Forming a destination management consortium involving public sector, private sector, non-profit organisations and local residents is imperative (Kozak and Baloglu, 2012). In this sense, Morgan (2012) concluded that:

“Tomorrow’s successful tourism destinations ... will be places which engage issues of social responsibility, ethical practice and sustainable ways of living and build strong partnerships between civil society, government and business” (Morgan, 2012: 9).

Clearly, elements of the visitor economy are to take important role in destination management and planning, and this is to happen in the not-too-distant future. Destination management and respective organisations started to play a critical role in managing economic, environmental and social resources of a destination (Kozak and Baloglu, 2012), and they are to be responsible for implementing sustainable development strategies. Such strategies aim to capture not only tourists and related services and attractions but local community regeneration and well-being by improving transport infrastructure and accessibility, creating employment opportunities and attracting inward investment (following the integration of a wider set of tourism-chain businesses).

FROM TOP DOWN TO BOTTOM UP: MARKETING TOURISM VERSUS MANAGING THE VISITOR ECONOMY

In the context of England, the transformation of destination management arrangements was seen as a transformation of Tourist Boards (Dinan, Coles and Hutchison, 2012). Whereas RTBs were mainly

involved in the provision of tourist information and had marketing and promotion functions, contemporary DMOs were expected to achieve more than simply enhance destination image and increase industry profitability. Nowadays, the notion of DMOs reflects a much more versatile approach to destinations (Laesser and Beritelli, 2013). Traditional scope of DMO operations, such as national and international destination marketing and promotion is now moving towards the locality – focusing on local planning and decision-making, impact on communities and local economic regeneration, greater voice and responsibilities of businesses. Increasingly, the role of newly-established DMOs then is to assist in the development and maintenance of industry partnerships and facilitate the planning and delivery of destination management (Morgan, 2012). And what is more, the notion of DMO implies strong emphasis on management of a destination and hence seeking to fulfil wider economic and community objectives. Bringing inward investment, creating employment opportunities and contributing to community regeneration projects are just a few to name (*see Figure 3*), which go along with traditional DMO objectives, such as enhancing destination image, marketing the portfolio of products and increasing industry revenue.

Local Authorities are to remain an essential player in developing tourism on a local level, regardless of the structure of new destination management models (Fyall, Fletcher and Spyriadis, 2009). In this sense, the synergy between newly-formed DMOs and LAs is crucial. Providing an input into shaping the visitor economy should become a core interest for LAs (Fyall, Fletcher and Spyriadis, 2009). Local Authorities may then be represented on the board of every destination management body. The far more common approach projecting tourism as peripheral activity, which focuses on attracting tourists through marketing activities and information provision is gradually moving out of focus, in favour of the visitor economy (Reddy, 2006).

It is therefore clear that the role of contemporary DMOs expands towards assuming greater leadership and having a strong voice in issues that go well beyond meeting traditional marketing and promotional goals. Goals, which have previously been associated solely with the tourism sector. Newly-reconstituted DMOs in England are intended to work towards developing a comprehensive agenda for tourism – capturing the wider set of organisations and hence considering the impact of the visitor economy within a destination. The emerging notion of the visitor economy advocates that visitor service sectors cannot be viewed in isolation (Balding et al., 2012). Visitors are to offer many far-flowing,

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multi-scale benefits and contribute to the broader economy (Balding et al., 2012), in this case employment, inward investment, infrastructure development, community regeneration and wellbeing, urban renewal alike. The more inclusive visitor economy (Reddy, 2006) inevitably implies wider participation from both public and private entities. The role of today's destination management then is to link stakeholders in the loose, chaotic environment they operate in and help them realise and take advantage of the broader impacts of the visitor economy.

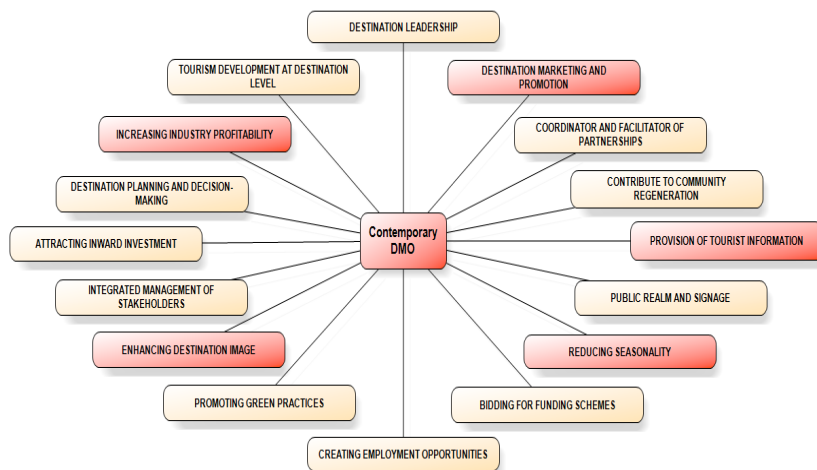


Figure 3. Contemporary DMO Priorities and Objectives (Source: Pike, 2004; Harrill, 2009; Fyall, Fletcher and Spyriadis, 2010; Laesser and Beritelli, 2013).

Notwithstanding, a broader enquiry into the extent and impact of the visitor economy is required. The visitor economy can be used to define the space, in which public, private and third sector organisations operate – the destination (Reddy, 2006). There is a need for an in-depth, further enquiry into the underpinned concept - its scope, elements, impacts on different levels of the value chain, particularly in the context of changing destination management. The latter is valid for England, where the new destination management model is to a high degree intended to capture elements of the visitor economy (Hristov, 2013). If visitor economy is to prove its wider contribution to local economies and other sectors, it has to be measured – as with the TSA framework estimating direct impacts of

tourism. Hence, further research should be pointed towards developing such framework - still challenging for today's destination managers, scholars and industry practitioners.

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