Preparing for the New Economy: Advertising Strategies and Change in Destination Marketing Organizations

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Information technology, especially the World Wide Web, has had a tremendous impact on the tourism industry over the past years. It is difficult for most destination marketing organizations, however, to keep pace with the evolution of new technologies, the emergence of innovative advertising strategies, the changes in the consumer market, and the growing competition due to increasing globalization. The National Laboratory for Tourism and eCommerce organized a workshop in an effort to identify effective strategies for tourism advertising on the Internet. The results indicated that information technology has led to a number of profound changes in the assumptions underlying communication strategies. It was concluded that the change occurring in the new economy involves a rethinking of who partners and competitors are and how networks with other organizations can increase organizational capacity to learn. Thus, it is argued that success of destination marketing organizations in the new economy is more about change in approach than technology itself.

The importance of information technology (IT), especially of the World Wide Web, in tourism has increased tremendously over the past years (Werthner and Klein 1999). However, since the technology itself is now available to almost everyone, its use alone does not necessarily bring a competitive advantage. The integration of IT into the organizational fabric of the destination marketing organization (DMO) is an important key to success. It is difficult for most DMOs, however, to keep pace with the evolution of new technologies, the emergence of innovative advertising strategies, the changes in the consumer market, and the growing competition due to increasing globalization. They often have to struggle with limited financial and human resources, a lack of technological expertise, and time constraints. The question of how to move from the current way of doing business to one that is responsive to these changes becomes a vital concern. Based on the idea that the discussion of challenges and the sharing of knowledge as regards the implementation of new advertising strategies will greatly help these organizations in facing and overcoming their barriers, the National Laboratory for Tourism and *e*Commerce organized a workshop that was held November 9 and 10, 1999 at the University of Illinois in Urbana-Champaign (National Laboratory for Tourism and *e*Commerce 1999). The workshop was intended to create a forum for discussion between leaders in the tourism and IT industries in an effort to identify effective strategies for tourism advertising on the Internet. This article summarizes the outcomes of the Workshop.

ADVERTISING: CURRENT TRENDS AND CHALLENGES

Advertising on the Web is increasing in importance and impact. For the advertising industry, the Web is simultaneously the biggest challenge and the biggest opportunity in a long time (Schwartz 1998). Current advertising spending on the Internet is estimated at $2 billion to $3 billion a year in the United States alone (see Figure 1). Web research companies such as Jupiter Communications and Forrester Research predict an astonishing rise up to $22 billion in 2004, with the Internet surpassing magazines, matching radio, and trailing only television, newspapers, and direct mail as an advertising medium (Rothenberg 1999).

The emergence of the Internet has already led to changes in the structure of the advertising industry and more profound changes are still on their way. Advertising agencies created and implemented only 26% of existing consumer-brand Web sites. The majority (51%) were designed by specialty Web site development firms, and the rest were created in-house (Schwartz 1998). A new industry sector, the ad-serving business, has evolved from the need for greater online advertising

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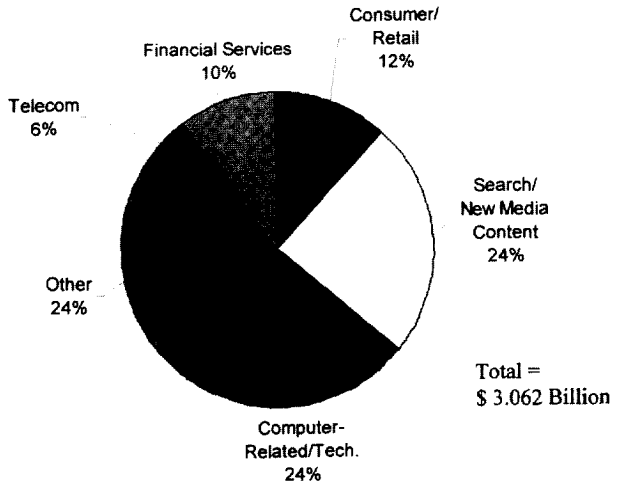
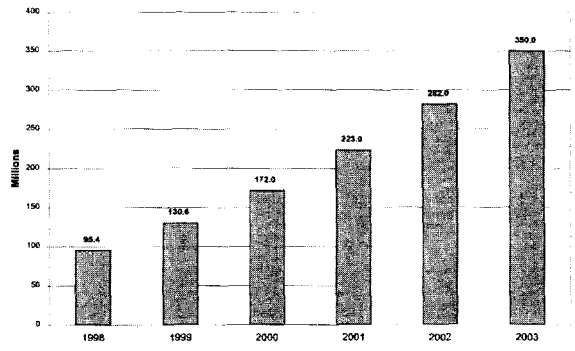
FIGURE 1
WEB ADVERTISING BY INDUSTRY CATEGORY



Source: Adapted from eMarketer (1999a).

FIGURE 2
GROWTH IN WORLDWIDE INTERNET USERS, 1998-2003



Source: Adapted from eMarketer (1999b).

expertise. Companies such as Doubleclick Incorporated invest heavily in devices to mine, analyze, and use data about Internet users and their behavior. They sell their services to ad agencies and ultimately may take over the business of their current clients (Rothenberg 1999).

Travel is the most important business on the Web in terms of the volume of e-commerce (eMarketer 1999a, 1999b, 1999c). It is also most likely to generate revenues and achieve profits through its Web presence. Travel and tourism is a very fragmented industry and an information-rich business, which makes it especially receptive for the benefits that the Internet offers (Schwartz 1998). Travelers will probably spend more than $12 billion in bookings online in 1999, but forecasts expect this figure to exceed 10% by 2003 (*Forbes Magazine* 1999). This estimate seems to be a realistic assumption given the expected increase in the number of Internet users (see Figure 2).

The Web as a New Advertising Medium

The question researchers and industry experts have increasingly encountered is whether advertising on the Web is different from advertising in other media and it needs to be addressed in new ways using new strategies (Godin 1999; Hoffman and Novak 1995; Zeff and Aronson 1999). The answer is not as simple as one might think. Numerous articles claim that Web-advertising strategies are very similar to traditional strategies. Other authors, however, point out that the Web is potentially a completely new form of advertising media that has to be managed using innovative concepts that cannot be compared with campaigns in other media. Leading advertisers do not simply use the Web for putting up banners; they create fully functioning businesses. Beside direct marketing and branding, these Web sites offer extranets for suppliers, intranets for employees, and a variety of sales and service links for customers (Klein 1997).

Another approach is to consider the Web as a medium that combines the elements of other media but is more than their sum. Advertising through the Internet requires new skills and distinctive approaches; however, it cannot be accomplished without knowing the basics of traditional advertising. Online advertising, like traditional forms of advertising, attempts to disseminate information, but it differs from other media by enabling consumers to interact with the advertisement (Zeff and Aronson 1999). Hoffman and Novak (1995) describe this form of communication as an "interactive multimedia many-to-many communication model," in which interactivity can also be *with* the medium in addition to *through* the medium. Both consumers and firms can interact with the medium, provide content to the medium, communicate in one-to-one or one-to-many forms of communication, and have more direct control over the way they communicate than by using other media. When everyone can communicate richly with everyone else, not only do the old communication models become obsolete but so do the business structures and communication channels that are based on them (Evans and Wurster 1999).

In comparison to traditional media, the Internet combines and integrates the following functional properties:

- information representation,
- collaboration,
- communication,
- interactivity, and
- transactions.

This flexibility makes the Web rich and appealing but also very complex and difficult to deal with. There is potentially no or little time gap between the production of information and its possible distribution, which in turn, places pressure on the management of Web sites since timeliness of information and continuous updating of Web pages have become a necessity in the battle for Internet customers. To install communication tools is easy; to handle the increased volume of communication is not. If resources are dedicated only to the development of the site but not to the ongoing manage-

ment of inquiries, the full potential of the technologies will not be reached. Increasing computing power and bandwidth together with the emergence of more and more sophisticated group ware has opened up new dimensions for collaborative efforts. Having the tools for collaboration, however, does not mean that collaboration will happen.

Collaboration, and as a possible consequence the building of virtual communities or virtual organizations, requires flexible and open structures, a change in the organizational mindset, and new business processes (Grenier and Metes 1995). The real opportunity on the Web is not doing things faster and cheaper; instead, the real opportunity is to rethink the business models that organizations employ, both in terms of delivering value to the customer and in building relationships with customers, suppliers, and other business partners (Hagel 1999). Hagel (1999) calls this new business model "collaboration marketing" and illustrates that building a virtual community for leisure travelers is not just another marketing gimmick but has considerable economic potential as well. For example, vendors spend a lot of money on focus groups. Consumer virtual communities, however, are focus groups that last 24 hours a day, 7 days a week, and offer an enormous learning opportunity for organizations. There are, of course, concerns about negative messages posted in these discussion forums, but there are so many virtual communities already on the Internet that such negative messages can be posted almost anywhere. It is simply a matter of getting to know about these messages, learning from them, and implementing appropriate action (Hagel 1999).

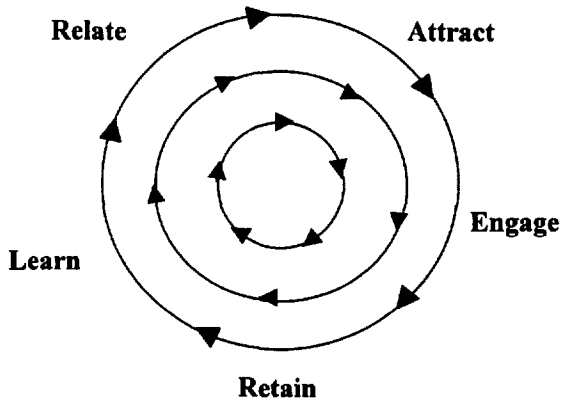
The Web offers a powerful combination of two-way interactivity, seamless transactions, addressability, on-demand availability, and customization (Parsons, Zeisser, and Waitman 1998). Using these capabilities will lead to deeper relationships and greater personalization of goods and services. Travel and tourism fit especially well with interactive media because they are an information-intensive industry in which transactions can be made online, and current Web users are heavy users of travel and tourism products and services. Interactive media call for interactive marketing. "The essence of interactive marketing is the use of information *from* the customer rather than *about* the customer" (Day 1998, p. 47). It differs from traditional marketing since it is based on a dialogue instead of a one-way communication, and it deals with individual consumers instead of mass markets (Parsons, Zeisser, and Waitman 1998). The success factors (see Figure 3 and Table 1) for marketing on the Web include the following:

1. attracting users,
2. engaging users' interest and participation,
3. retaining users and ensuring they return,
4. learning about user preferences, and
5. relating back to users to provide customized interactions.

Schlosser and Kanfer (1999) argue that most Web sites still ignore the unique possibilities of interactive media. Organizations continue to broadcast information instead of letting the consumer interact with the Web site content. Adherence to noninteractive (i.e., informative but not engaging) advertising leads to the perception that Internet marketing is not entertaining and, therefore, to less compelling attitudes toward advertising on the Web (Schlosser and Kanfer 1999).

The Web also enables DMOs to blend together publishing, real-time communication, broadcast, and narrowcast

FIGURE 3
INTERACTIVE MARKETING FRAMEWORK



Source: Adapted from Parsons, Zeisser, and Waitman (1998).

TABLE 1
EXPLANATION TO FIGURE 3

Activity	What	How
Attract	Attract consumers to the application	Audience creation Mnemonic branding "Piggy-back" advertising
Engage	Generate interest and participation	Intuitive interface or navigation Interactive content User-generated content
Retain	Make sure customers come back	Dynamic content Transaction capabilities Online communities
Learn	Learn about consumers' preferences	Information capture Continuous preference learning
Relate	Customize interaction and value delivery	Personalized/customized communications and products/services Real-time interactions Linkage to core business

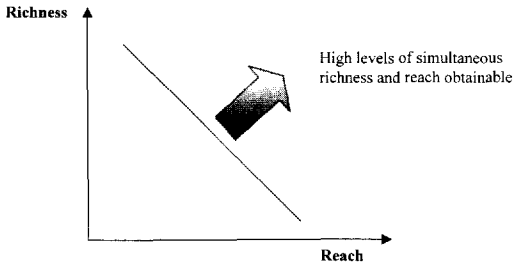
Source: Parsons, Zeisser, and Waitman (1998).

(Hoffman, Novak, and Chatterjee 1995). It is a medium that attracts attention and creates a sense of community. It is a personal medium, an interactive medium, a niche, and a mass medium at the same time (Schwartz 1998). In contrast to traditional media, the trade-off between richness and reach is not applicable to the Web. Evans and Wurster (1999) define *richness* as the quality of information (accuracy, bandwidth, currency, customization, interactivity, relevance, security). *Reach* refers to the number of people who participate in the sharing of that information. The trade-off between richness and reach leads to asymmetries of information. When open communication channels are introduced that allow the free flow of information, the system of asymmetries collapses.

Thus, when DMOs are able to distribute and exchange rich information without constraint, "the channel choices for marketers, the inefficiencies of consumer search, the hierarchical structure of supply chains, the organizational pyramid, asymmetries of information, and the boundaries of the corporation itself will all be thrown into question" (p. 37).

Figure 4 illustrates the new dimensions for doing business on the Web. It suggests that a greater, more targeted audience can be reached with only a portion of the traditional advertising spending. Internet advertising is the convergence of traditional advertising and direct response marketing. Online advertising offers the opportunity to precisely target an audience to deliver advertisements that are customized to the user's particular interest and taste. This can be achieved through Web measurement and ad-serving tools, database mining, collaborative filtering, behavioral analysis, and personalization tools (Zeff and Aronson 1999). Since the Web allows for mass customization, new bases for market segmentation need to be found.

FIGURE 4
THE BLOWUP OF THE RICHNESS/REACH TRADE-OFF



Source: Adapted from Evans and Wurster (1999, p. 31). Reprinted with permission.

Measurement

Knowing the target groups, which ultimately will be broken down to the level of individuals, is a prerequisite for effective online advertising (Hoffman, Novak, and Chatterjee 1995; Werthner and Klein 1999; Zeff and Aronson 1999). Customization of the advertising message and the medium is even more important for advertising on the Web than for campaigns in traditional media. Fortunately, the use of "log files" and "cookies" enables the collection of immense amounts of detailed information about Web users, but this information needs to be used in intelligent and innovative ways to gain greater insight about customers and ought to be incorporated into the site design. It is dangerous to believe that since the cost of advertising on the Web is minimal, advertising messages do not need to be targeted. Internet users have developed a culture that usually does not tolerate mass e-mails (Schlosser and Kanfer 1999). Thus, it is argued that Web marketers cannot forget the high cost of turning off potential customers. Determining specific target markets and measuring the impact of Web-based strategies are still major challenges for most companies. But how can the success of customization efforts be evaluated? Internet research institutions publish monthly or even weekly figures, but their estimates rarely match. However, there are no established criteria for judging the success of Web sites (Hoffman, Novak, and Chatterjee 1995), and in addition, due to the rapidly changing conditions, firms are unsure of the number and characteristics of people on the Internet, which makes segmentation efforts extremely difficult.

The lack of standardization comprises several aspects (Novak and Hoffman 1996). First, there are no standardized measures for traffic on commercial Web sites. Second, no standards have been established for measuring consumer response to Web ads. Third, there are no established principles for optimal media pricing models. Finally, the complexity of the Web makes standardization a challenging effort. To overcome part of this problem, traditional advertising measures have been adopted (see Table 2 for a list of top Web advertisers, using traditional measures). The usefulness of this approach is limited since traditional measures can only assess certain aspects of Internet advertising. They are based on traditional concepts, such as circulation statistics, that are irrelevant on the Web. Moreover, since most of these measures are obtained through log files, it is difficult to ascertain the meaning behind the results (e.g., whether clicking on a link was an accident or an intended behavior) (Schlosser, Shavitt, and Kanfer 1999). Assessing whether the consumer seeks additional information online or offline (e.g., by loading additional pages, revisiting the site, sending a request by e-mail, or calling) might be a better way to establish the effectiveness of a site. The navigational availability and capabilities of a site (i.e., accuracy, usability, speed, comprehensiveness) also could be used as a criterion because it increases the entertainment value and leads to more positive experiences (Schlosser and Kanfer 1999). Schlosser and Kanfer (1999) also mention productivity gains such as the savings that can be achieved through sending e-mails instead of traditional direct mailings as aspects that need to be incorporated into a Web effectiveness measure.

TABLE 2
TOP 10 WEB ADVERTISERS FOR THE MONTH OF OCTOBER 1999

Advertiser	Impressions	Reach %
1. TRUSTe	1,183,155,924	23.84
2. Microsoft	540,347,373	40.82
3. Yahoo!	342,842,230	30.68
4. Amazon	302,409,016	37.57
5. SexTracker	225,407,989	8.45
6. America Online	202,697,522	29.83
7. Next Card	181,046,656	23.71
8. E*TRADE	144,346,805	13.35
9. Wingspan Bank	143,006,624	24.09
10. TD Waterhouse	137,758,129	4.91

Source: Nielsen/NetRatings (1999).

The only measurement "standard" that can be found throughout online advertising literature is the importance of measuring the effectiveness of Web advertisements. The interested reader can find a comprehensive list of traditional and new advertising measures in Novak and Hoffman (1996). The Web's interactivity and the possibility to track the behavior of single customers open up new potentials for measuring the success of advertising. Sterne (1997) describes the Internet as the most measurable medium. Through the use

of Web-technology, it will be possible to assess something that has been largely guesswork in traditional marketing, and agencies ultimately will be held to targets such as return on advertising investment (Business: Advertising That Clicks 1999).

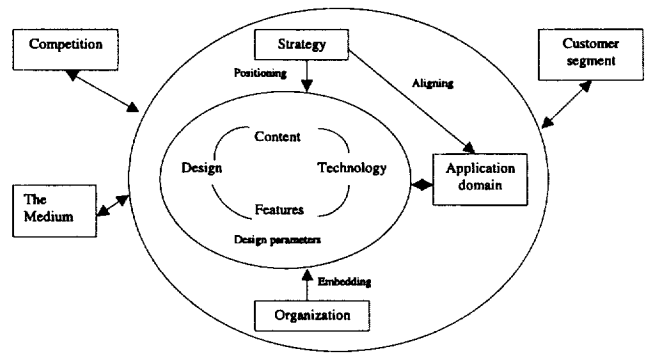
The Importance of Web Design

Even if the success of Web pages can only be partly assessed at the moment, some guiding principles for Web design have been established. Werthner and Klein (1999) propose the following framework for successful Web design (see Figure 5). The design of the Web site should reflect the characteristics of the medium, the customers, and the competitive environment (Maddox 1997). It should be embedded in the organizational culture and structure, aligned with the application domain, and used for strategic positioning.

In early stages of the Internet Web site design was driven mainly by the technology available. Now, there is an increasing trend toward customer-focused Web design. Understanding the information search behavior of Internet users is crucial for the success of Web sites. Hofacker (1999) distinguishes between surfing and searching, which mainly influences the amount of information sought, the importance of details for the user, and the degree of patience that can be expected. When looking at a Web site, the user processes the presented information in a sequence of stages: (1) exposure, (2) attention, (3) comprehension and perception, (4) yielding and acceptance, and hopefully (5) retention. The implications for the design of Web sites are numerous. Images, page copy, and the way the site is structured should take into account that information must pass through all five stages to affect consumer behavior. First, interactivity is an imperative. The very behavior of consumers changes when they log onto the Internet (Schwartz 1998). Internet users not only search for information but also seek a different kind of experience and expect interaction. This experience can be greatly enhanced through sites that offer interactivity, allow attention to be focused, and lead to perceived congruence of skills and challenges. A positive experience on the Web site increases the time spent at the site (Hoffman and Novak 1995) and mainly depends on the hypermedia content but also can be influenced through community building features such as a discussion forum. The content of the Web pages is extremely important for Web sites of DMOs because it directly influences the perceived image of the destination. Thus, it is crucial that content is accurate, attractive, and easily searchable (Beirne and Curry 1999). Furthermore, site content defines the level of interactivity and vividness. Providing opportunities for users to actively select activities increases attention and joy of use (Hoffman and Novak 1995). Too much complexity can lead to mental and physical fatigue. Therefore, the challenges at hand should match with the user's skills. To avoid site jumping, it is important to consider at what point in the process consumers are likely to become bored or overwhelmed by the complexity of the interaction.

Another aspect usually mentioned in the context of Web design is extensive downloading times, but a long up-front waiting time does not always have to lead to a negative evaluation of the Web site (Dellaert and Kahn 1997). Managing one's waiting experiences effectively (e.g., by indicating the downloading time, by having top paragraphs pop up earlier so that Web users are kept busy) can greatly enhance the Web

FIGURE 5
A FRAMEWORK FOR WEB DESIGN



Source: Werthner and Klein (1999, p. 281).

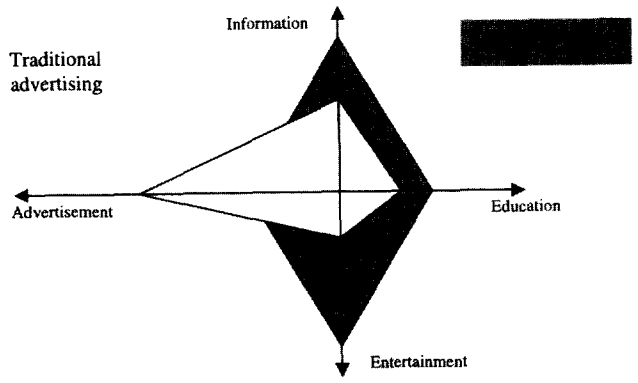
experience. Knowing the demographics of the target group and their search behavior can lead to a better understanding of how important the time factor is. With the evolution of new technologies, the number of design options available has become abundant, and various books have been published that try to establish general design principles. There is for sure no single best solution. When designing a Web site, the goals of creating the site and the characteristics of the targeted users are the factors that should guide the design.

Pull versus Push

The Web is not a push or "disruption" medium like television. It is largely a pull medium whereby consumers actively seek information. That is, consumers are in a "lean forward" and not in a "lean back" mode (Cleary 1999). It is a medium that can empower consumers because they are in control (Schlosser, Shavitt, and Kanfer 1999) and want to be active. Therefore, the application of traditional advertising models that assume a passive, captive audience will not lead to the desired outcomes (see Figure 6). Godin (1999) introduced the concept of "permission marketing." This form of marketing uses the interactivity offered by the Web to engage customers in a dialogue and, as a consequence, in a long-term interactive relationship. It is based on the premise that the attention of consumers is a scarce good that needs to be managed carefully. Permission marketing gives consumers the opportunity to volunteer to be marketed to in return for some kind of reward. Volunteers are of course more likely to pay attention to the advertising message because the advertising message itself becomes anticipated, relevant, and personal. The emphasis of permission marketing lies on building relationships with consumers instead of interrupting their lives with mass advertising messages.

The Web, however, may increasingly adopt push strategies—software that acts like a screensaver and displays information retrieved from the Web whenever the user takes a break does already exist (Schwartz 1998)—but not without paying considerable attention to the personalization imperative. Electronic agents have been developed and increasingly implemented to automate the first four stages of the buying

FIGURE 6
INFORMATION PROFILE OF TRADITIONAL VERSUS WEB ADVERTISING



Source: Werthner and Klein (1999, p. 285).

process (Maes 1999): (1) need identification, (2) comparison of different products, (3) comparison of different suppliers, and (4) negotiation without losing the personalization aspect. There are currently two trends in terms of agent technology. First, it will soon be possible for agents to store profiles on the client's browser, a cell phone, or on smart cards, so that the profile can be accessed whenever a customer enters an electronic or physical site (e.g., a hotel reception). Second, profile information will be increasingly shared among networks of sites (e.g., Web sites of DMOs and airline companies). At first sight, this may look like a clear development toward the Web as a push medium, but agent technologies will also encourage new developments in advertising and marketing. One example is reverse advertising wherein consumers will advertise what they want instead of suppliers offering their products and services (Maes 1999). As a result of their desire to be in control, online consumers reject any traditional advertising message that does not have special interest to them. They expect personalization in return for the time they invest in browsing through cyberspace. However, most companies approach Internet marketing with a broadcast mindset; that is, they are still developing messages designed to convince the maximum number of average customers.

Branding on the Web

Branding is also an important factor when it comes to site loyalty. On the Web, brand names matter even more because of the prevailing information overload (Sterne 1997) and because they serve as a substitute for physical facilities that may help to build trust in the "real" world. As in traditional media, branding helps consumers to construct an image of a product and therefore save time in their decision-making process. Novelty on the Web is easily imitated and wears off soon; therefore, most companies will continue to rely on offline media to build their brands. It is argued that the Web is not an alternative medium; rather, it is a tool that can be effectively combined with traditional branding efforts (Cleary 1999). Brand building requires coordinated online and offline campaigns (Business: Advertising That Clicks 1999) and a holistic communications plan. Brands will increasingly become statements about the customer, an organization's knowledge of certain customers, and customers' trust in the company's ability to deliver the products and services. Brands will no longer be product-based but based on an understanding of who the customers are (Hagel 1999). Organizational barriers often hinder the successful implementation of this advertising knowledge. It is, therefore, important to understand the nature of businesses and how the emergence of Internet technologies will change organizational structures.

THE NATURE OF DMOs

DMOs are increasingly struggling with the abundance and complexity of issues they have to face when trying to establish an online presence (Fesenmaier and O'Leary 1998; Gretzel, Yuan, and Fesenmaier 2000). To understand the problems they encounter, it is necessary to look at the specific nature of their business. DMOs are primarily marketing organizations and providers of visitor services, with little actual power to plan and develop. Their rationale is that by pooling the marketing resources of the public and private sectors, a greater advertising impact can be achieved than can in the case of dispersed efforts. Sufficient funding is a critical success factor for DMOs (Law 1993). It determines how much can be spent on advertising, staff, and research (Touche Ross 1991). In the United States, the hotel tax is the main source of income. Membership subscription is the second important source of funding.

The convention and visitor bureau (CVB) is a DMO that acts at the local level. It is a pivotal organization within the tourism system. According to Gartrell (1988), CVBs are distinctive organizations that "represent and market their communities in a very competitive market place that involves meeting and conventions, group tours, and visitors" (p. 54). The CVB's primary mission is to promote tourism business and attract visitors to its region, with the ultimate goal of enhancing the economy and the region's image through deft coordination of the diverse components of the tourism industry. Bureaus also are involved in regional planning and development. First, their plans include the formulation of a strategy, the selection of activities, and the improvement of the environment. Then, they need to obtain financial support to implement the strategy. It is relatively easy to come up with ideas but often very difficult to obtain the necessary funding.

Most bureaus are classified as independent, not-for-profit organizations; some are part of city or county governments, or the local chamber of commerce; while others have special legal authority. Bureaus vary in terms of structure, scope, size, geographic location, and facility management. By virtue of their distinctive identities, bureaus enjoy flexibility with respect to financial development, fewer governing administrative restrictions and personnel practices, and the freedom to market destinations without the involvement of partisan politics. CVBs act as the liaison between prospective visitors to the area and the businesses that will interact with visitors when they come. They collect and provide information from and to both ends of the value chain and often function as a catalyst for urban and regional development. In the information era, the rapid changes of external

and internal environments coupled with the rapid developments in IT bring tremendous pressures on bureaus. Being information brokers, bureaus have been confronted with a series of challenging issues including those related to infrastructure, economics, partnerships, time management, and service quality.

Infrastructure

Tourism is a networked and information-intensive business. The success of bureaus, thus, depends on the quality of the infrastructure (e.g. road, highway system) of the destinations that they represent (Gartrell 1988). The Internet is part of this infrastructure. The use of Internet technology enables the transition and distribution of information to be quicker, better, and cheaper regardless of geographical and time limitation. Vice President Al Gore, in March 1994 at the World Telecommunication Development Conference, laid out a global vision of using Internet technology to construct a global information infrastructure (GII). GII not only serves to foster economic growth and development but also helps to generate global awareness and social improvement (Garcia 1995). For DMOs, such as CVBs, the integration of such a GII into organizational processes will fundamentally shape their potential for success.

Economic Issues

One important mission of bureaus is to contribute substantially to the viability of the local economy by maintaining destination attractiveness and by increasing the awareness of prospective visitors. Fesenmaier and van Es (1998) point out, "In economic terms, rural means having to overcome the friction of space." But as mentioned above, space defined in traditional ways is becoming less important. IT provides "a whole new environment" (Fesenmaier and O'Leary 1998); it supports new ways to collect, analyze, present or transmit, and deliver information, new ways to facilitate the creation and transmission of knowledge throughout the tourism industry. In short, the digital revolution has changed almost everything about how the tourism industry does business. However, bureaus need to understand the strength and effectiveness of using IT to deploy a better marketing and promotion strategy.

Partnerships

The success of bureaus relies on the support and involvement of their partners (i.e., hotels, travel agents, government agencies, etc.). Many of CVBs cover entire metropolitan areas or several counties rather than just one city or county. Since their boundaries (geographical boundaries or political districts) are becoming increasingly irrelevant, it is beneficial for them to join their marketing efforts to attract a wide range of tourist segments. IT offers bureaus the opportunity to build fruitful and interactive relationships with their partners beyond the constraints of time and physical location (i.e., virtual communities) (Cook 1998; Meis 1998). It expands the potential of partnerships with various businesses while maintaining these partnerships becomes less costly. The challenge for bureaus is how they can take advantages of IT to extend their influence and to recast their external relationships, and how they can gain competitive power by working closely with each other instead of against each other.

Time

Information technologies enable bureaus to cope with the growth of information but also make it imperative that new techniques and strategies be developed on which bureau marketing efforts can be based (Gartrell 1988). One of the promising values of IT is that it compresses time by allowing bureaus to respond faster to their customers and partners than ever before.

Service Quality and Service Attitude

Providing quality services is the key to retaining customers and to building long-term relationships. Although service quality largely counts on service attitude held by a bureau's personnel, IT can be used to assure service quality, efficiency, and convenience, and to expand the types of services offered. However, it also presents significant implementation challenges to organizations (Perdue 1998). The question is whether organizations are capable of exploring and identifying fits between the potentials of IT and the practical needs of their business. Also, organizations need to understand the needs of consumers and how IT can be used to fulfill those needs. That is, IT calls for a measurement that is able to identify the gap between expected service and perceived service of customers.

ADVERTISING STRATEGIES AND DMOs: A FOCUS ON CHANGE

Advertising strategies for using the Web lag substantially behind technological development. It is clear, however, that competitive advantage on the Internet will not be realized by applying existing advertising models but, rather, by developing innovative concepts. Integrated approaches that build on the advantages and capabilities of the technology (e.g., richness and interactivity) need to be translated into concrete advertising actions (e.g., relationship building, branding, brand loyalty). The nature of the Web provides new opportunities but also poses serious threats, especially to small tourism organizations. Naisbitt (1994) refers to this phenomenon as the "global paradox." This ambiguous situation calls for risk taking and at the same time requires careful management. The Web gives DMOs the ability to reach highly motivated customers with information-rich messages at a negligible cost. But the actual execution of Web-based advertising strategies is still a challenge. The question is, What is the best way to implement an online advertising concept? and, How can Web technologies and innovative advertising strategies be effectively integrated into the fabric of an organization? Levinson and Rubin (1995) suggest a six-step approach to integrate an online advertising plan into the overall business context:

1. a mission statement that uniquely defines or redefines the business,
2. a set of goals to achieve with the advertising plan,
3. a list of resources needed to carry out the effort,
4. a list of targets that need to be attacked,
5. a set of weapons and tactics to attack the targets and to overcome barriers, and
6. a calendar that guides through the battle.

Sterne (1997) adds getting management support, assigning responsibilities, establishing procedures, and setting standards against which the efforts are measured to this list. The online plan needs to be continuously revised because things are changing rapidly on the Web, consumers tend to forget, and competition is tough.

It is argued that successful online advertising is not just about technology and new communication channels. It is about deconstructing traditional business models and reinventing the organization (Forrester Research 1999). The integration of innovative technologies will allow firms to break away from obsolete and ineffective approaches to differentiate themselves in a highly competitive, global, and networked economy. What really matters is how change is integrated into the DMO.

Change is not a new concept. It has always been the driving force in the evolution of systems, whether they are ecological, biological, social, or organizational entities. And it has always been difficult for people to deal with those changes. Machiavelli wrote in the 15th century, "There is nothing more difficult to plan, more doubtful of success, nor more dangerous to manage, than the creation of a new system" (Goldberg 1992, p. 41). What is new is the accelerating speed with which it occurs and the growing outreach of its implications. Bill Gates (1999) emphasized in his book *Business @ the Speed of Thought* that business is going to change more in the next 10 years than it has in the past 50. This trend to a large extent is caused by the emergence of new information technologies and, as a result, the ease with which information can travel across the globe because information acts as a catalyst for change (Lutz 1986). Yet, IT not only accelerates the speed with which environmental changes occur but also makes it possible to respond quickly to such changes. But the pace of change is only one part of the current scenario (Shukla 1997). The other main factor is the complexity of change. Changes not only are becoming less predictable but also are occurring simultaneously.

Change can be defined as "thinking or doing something new or differently" (Hultman 1998). It describes the move from one stage to another. Companies cannot avoid change, but they do have a choice in how proactively they seek it. According to Keffeler (1992), organizations have only two options: to choose change or to chase it. There is risk in change, but there is also the risk of not changing (Hultman 1998). No success or competitive advantage is permanent; therefore, the winners can only be those who keep moving (Prokesch 1997), and they have to move a lot faster than anybody else.

Given the growing importance of technology in all organizational functions and areas, organizations can either adapt to technological changes or will have to face a decline in their organizational viability. Productivity in the knowledge era involves creative thinking, flexibility, and the ability to change and adapt quickly (Koch and Steinhauser 1983). Adaptation to technological change cannot be realized without changes in the organizational structure and culture. Indeed, the most important reason why the implementation of technologies fails is that organizations fail to initiate these necessary changes. Organizational changes are the prerequisite for successful and fast technology integration. Thus, the relationship between IT and organizational change has become a vital concern for most organizations (Rossetti and DeZoort 1989).

Organizational structure can be characterized by how rigid or flexible and how adaptive or nonadaptive an organization is, and how it deals with uncertainty and risk (Zeira and Avedisian 1989). Rossetti and DeZoort (1989) mention the shape, composition, and degree of decentralization as an important structural factor that influences an organization's capacity to change. Referring to Drucker, they suggest that eliminating middle management leads to a better diffusion of knowledge within organizations. The old command-and-control model of organizational structure will not be suitable for the environment that organizations are going to face in the 21st century. Mackiewicz (1994) mentioned that organizational structure is expected to undergo the greatest amount of change in the new millennium. Organizations of the future will build their competitive advantage on learning instead of controlling. Informational strategies such as knowledge management are a direct threat to the hierarchical nature of most organizations (Steck 1993). Top-down management reinforces fear, distrust, and internal competition and reduces collaboration and cooperation. It leads to compliance, but a high capacity to change requires commitment (Drucker et al. 1997). Rapid change per se is not a problem. The real issue is the organizations' inability to deal with change. This inability stems from the belief that change can be managed using traditional bureaucratic management approaches. Bureaucracy has been designed to resist change (Waterman 1990). It is necessary for establishing consistency and stability in an organization, but hierarchies make the free exchange of knowledge more difficult and, thus, limit the organizational capacity to change. It is argued that organizations need to be very flat, team-based organizations designed to motivate and help people to learn (Prokesch 1997). Flat organizations have a built-in flexibility. They have a less rigid division of work, a constant search for innovative solutions, participation in decision making, a free flow of communication in all directions, very general job descriptions, a delegation of authority, and a greater sensitivity to environmental changes (Zeira and Avedisian 1989).

Organizational structure also refers to the communication infrastructure. "If change is about learning, it is also about communicating" (Schiemann 1992). The more comprehensive and flexible the corporate communication network is, the more likely employees know where the organization wants to go. This is an important factor for reducing employee resistance and for initiating and sustaining change because change tends to ignore the proper channels and established bureaucratic lines (Waterman 1990). The current literature does not provide a clear picture of what the organizational structure of the future DMO will look like. Peter Drucker refers to a "symphony orchestra," Alvin Toffler describes it as "adhocracy," Tom Peters as "permeable membrane organizations," and John Naisbitt as a "collapsed pyramid." What all concepts have in common are three very basic ideas (DeLisi 1990):

- Organizations of the future will have fewer layers of management and fewer staff functions.
- Organizations of the future will revolve around small teams.
- Organizations of the future will be customer centered and closer to their markets.

New IT facilitates the emergence of new structures but, as mentioned above, does not drive their development. With information being available to all organizational members regardless of their position within the organization and regardless of time and space, multiple management layers and hierarchies are no longer needed to move information up and down.

Most of the problems organizations face today when designing and implementing online strategies stem from trying to fit everything into existing structures and models. It is suggested that DMOs need to redefine their nature of business and the underlying models and processes. This requires fundamental organizational changes that have to be managed carefully. Since the Web is ever evolving and new challenges occur "at the speed of thought," these changes should be directed toward increasing the organizational flexibility and openness to change. Becoming a learning organization is vital for establishing competitive advantages in the new economy. Learning is not restricted to areas within organizational boundaries. Therefore, profound change also involves a rethinking of who the partners and competitors are and how networks with other organizations could increase the organizational capacity to learn. Organizational goals that were suitable in the past become increasingly outdated. Change implies questioning old goals and functions and establishing new organizational frameworks.

PREPARING FOR THE FUTURE: IMPLICATIONS FOR DMOs

The most significant trend is the accelerating speed of technological development. The consequence of this rapid change is the emergence of innovative Web-based technologies that lead to a reconfiguration of the environment in which tourism business is conducted. Understanding these changes is crucial for creating a vision in the tourism organization that things are going to evolve. It is suggested that tourism leaders need to convince stakeholders to come along with them on this move toward innovative strategies, knowing that it will cost money, require a lot of training, and take time.

The problem with many current online advertising strategies is that organizations try to fit everything into existing structures and models. The coevolution of innovative Web-based technologies and communication strategies will lead to a quantum change in the way business is conducted, from business to consumer, from business to business, and internally. Understanding the medium, the customer, the business, and partners seem to be the key variables for the design of an effective online advertising strategy. Understanding usually comes from knowledge. Since no expertise is readily available, learning, collaboration, and the active sharing of online experience become extremely important in the process of knowledge creation. As the Web matures, waiting is not an option. In this era of rapid and fundamental structural change, DMOs face numerous barriers when trying to integrate online advertising strategies into their overall organizational concept. Acknowledging that barriers exist and identifying their scope and nature can already be very helpful in the attempt to successfully overcome these obstacles. What success on the Web is really about is the ability to adjust quickly to changes from the demand, supply, and technology side.

Learning forms the core of an organization's ability to adapt to a rapidly changing environment. It is the key to identifying and exploiting opportunities more rapidly and completely than the competitors. A learning organization is an organization that continually expands its capacity to actively influence and/or create its future. Only DMOs with an ability to learn quickly and to translate that learning into action rapidly will be able to gain competitive advantages in a high-velocity marketplace.

A number of issues were discussed during the Workshop that provide a solid foundation for developing strategies that effectively exploit the strengths of emerging IT. First, it was concluded that successful online advertising requires different skills and new approaches because of the distinctive characteristics of the Web. A combination of online and offline advertising strategies seems to be the best way to fully use the capacities of the Web. A Web site is not a stand-alone advertising tool. Banners and cross advertising are necessary to control Web traffic. Portals are the most important points of entry for users in search of tourism information; thus, developing strategies to be included in multiple portals is crucial for a DMO. A consistent advertising message distributed through different media leads to synergies between online and offline strategies. Since the Web differs from other media, the focus should be on doing things differently, not just on doing old things cheaper and faster. Marketing strategies that respond to the nature of the Web are strategies that are based on personalization, experience, involvement, and permission; in contrast to traditional marketing that builds on mass communication, tangible products, one-time selling instead of forming relationships, and unsolicited interruption.

Understanding the online consumer and the essence of a good Web site is crucial for successful online advertising. Internet users are far from being a captive audience, in that one can easily go to another site if it does not meet customer needs and expectations. Web site visitors have developed their own culture of what is acceptable in terms of advertising on the Web; their attitudes differ from those of offline consumers. The design of a Web page needs to reflect the selected strategies, such as personalization and interactive marketing. Seeing the Web site through the eye of the consumer helps in determining what content and design should be used. If the consumer is looking for comprehensive information about a destination in one spot and not as pieces of information scattered across various sites, then DMO Web sites have to be able to cater for this specific consumer need. More has to be learned about consumer information processing and decision making on the Web to achieve the necessary customer focus. A continuous dialogue between Web designers and advertising experts is essential for achieving consumer-focused sites instead of technology-driven Web pages.

Much discussion focused attention on user attitudes, the importance of choice, and the intangibility of tourism products and services. It was concluded that online consumers not only want information but also seek entertainment (or "edutainment") when they go onto the Web (Stock 2000). They are more active than in the case of TV advertising or ads in print media. It is clear that if Web sites do not offer them an enjoyable experience, the consumer's attention cannot be retained, and they will quickly switch to a more exciting site. Interactive online advertising renders it possible to tailor the site content and outlay to the needs of the individual consumer. Chat rooms, testimonials, and so on help create

communities on the Web that are necessary for communicating experiences.

A third issue addressed at the Workshop was how difficult it can be to justify the move toward Web-based advertising. Resources usually are allocated only to initiatives that have the potential to be successful. This is especially true in tourism where, however, advertising success cannot be directly translated into sales volume or other monetary measures. Thus, it is very difficult to evaluate online advertising campaigns and Web sites in general. It was concluded that the ease of navigation of a site serves as a useful indicator for how likely a site is to successfully communicate the information it offers. Feedback tools on the site are another form of measuring how effective a Web site is. Caller data and visitor surveys can also be a rich source of information in terms of analyzing the impact created through online advertising.

It is also clear that an integration of Web technologies and advertising strategies is necessary because certain technologies are more suitable for certain strategies. Web strategies that use innovative technologies are important, but they still have to fit into the overall advertising strategy. The characteristics of the target audience and the product or service offered determine, to a great extent, the technology that can or should be used. Tourists and tourism professionals, for example, differ considerably in terms of information needs and information processing. In addition, the technology level of the target group should be kept in mind when integrating features such as videos into the Web site design.

Importantly, it was concluded that limited resources, lack of proper management, insufficient knowledge, lack of communication, legal regulations and restrictions, and ownership issues were the most important barriers to technology implementation and adoption. Especially smaller DMOs are usually overwhelmed by the amount and complexity of barriers they encounter when trying to establish online advertising strategies. Effective communication between all individuals and organizational units involved in the design and implementation of online strategies can greatly facilitate the process and enhance the outcome. If possible, expertise should be acquired in-house to have more control over the outcome and to be able to increase the intellectual capital of an organization, which is necessary for developing innovative approaches. If an external agency is charged with the design and/or implementation, goals and expectations have to be clearly communicated. Online advertising is not just another sales effort. It involves the creation of a business on its own and, therefore, requires proper management and sufficient resources.

It was further concluded that the most successful DMOs on the Web are those who have either applied old advertising strategies in an innovative way or have introduced completely new concepts. Continuous innovativeness, however, cannot be achieved with 19th-century organizational structures and concepts. Organizations have to rethink their structure, culture, strategies, and business processes. DMOs need to develop organizational cultures that encourage innovations and risk taking and see failures as opportunities to learn. Organizational structures should be as flat as possible so that information can be passed on easily and ideas shared extensively. Learning should occur on the individual and organizational level. Knowledge creation is useless if the knowledge is not processed and transferred, so that active learning can occur and become incorporated into the online advertising concept. It is clear that boundaryless organizations that are able to form networks with others quickly to pool resources and leverage competencies can best take advantage of the dynamic nature of the Web.

The fundamental changes in DMOs discussed above must be managed carefully. Since the Web is ever evolving and new challenges occur at the speed of thought, these changes should be directed toward increasing organizational flexibility and openness to change. Becoming a learning organization is vital to establishing competitive advantage in the new economy. The profound change occurring in the new economy involves a rethinking of who partners and competitors are and how networks with other organizations can increase organizational capacity to learn. As part of this rethinking effort, the framework for effective communication within the tourism industry is based on the realization that more traditional directed approaches have given way to "conversations" in which the consumer is actively involved. Thus, it is argued that success in the new economy is more about change in approach than about technology itself. Clearly, the future of a DMO in the new economy rests with its ability to embrace change and use it as a force to build and enhance these conversations.

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