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## Marketing Orlando as a Tourism Destination: Collaboration and Competitiveness

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The Dick Pope Sr. Institute *for* Tourism Studies  
at the  
UCF Rosen College *of* Hospitality Management

**Marketing Orlando as a Tourism Destination:  
Collaboration and Competitiveness**

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**With the Support of Kelly Semrad**

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# **MARKETING ORALNDO AS A TOURISM DESTINATION: COLLABORATION AND COMPETITIVENESS**

## **INTRODUCTION**

Marketing is an important activity for destinations but it can be a challenging task for most of the tourism organizations representing the destination. First, destination marketing is compounded by the fragmented nature of the tourism stakeholders who are responsible for components of the total offer. While tourists look at a holiday as a complete 'experience' and typically select among destinations on the basis of the total set of destination attributes, it is usually marketed and sold in the market place in small and fragmented pieces by a variety of individual suppliers that operate independently. This practice renders individual tourism suppliers' marketing and promotion efforts of limited value if they do not relate to strategies consistent with other suppliers in the total offer. Second, no single agency can control and deliver a rich combination of tourism product and service portfolio at a destination, as the marketing of a tourism destination is shared by another plethora of organizations such as various types of tourism suppliers, tourist information centers, regional tourism boards, and convention and visitors bureaus, etc. This individual and independent marketing and promotion efforts of the various tourism organizations will not lead to a holistic image of the destination as a whole and thus will not put the destination in a competitive position in the marketplace.

Research has indicated that stakeholders individually could create less promotional impact on potential visitors than a promotional campaign in which resources are pooled. In an increasingly competitive marketplace, the ability to create greater levels of awareness through concerted efforts may give advantage to a destination. By pooling efforts, all organizations involved can achieve economies of scale. In the marketing process, stakeholders can achieve their objectives more effectively by recognizing their interdependencies, and collaboration among the tourism organizations in a destination are particularly attractive in destination marketing, because there is usually a congruence of objectives among the different sectors of the local tourism industry – attracting more tourists to the destination can benefit both the narrow financial objectives and the more diverse strategic objectives of these tourism organizations. As a result, there has been increasing recognition of the value in collaborative tourism marketing.

In addition, the interdependency of organizations involved in marketing and promoting the tourism destination provides a basis for the development of co-marketing alliances and networks. This arises from recognition and understanding that the success of each organization in the destination depends in part on other organizations and that two or more of them can collectively achieve more than the sum of each individual's own efforts. While companies in the manufacturing industry have a long history of collaborating to add value and/or reduce costs of the final product, collaboration among

tourism organizations at the same level of a value added chain has become increasingly important. Thus, there is a need to create a means of bringing the tourism industries together for the common purpose of tourism destination marketing through collaboration, so that these stakeholders can be united in their willingness to treat the destination as a single entity and to help build a strong tourism economy.

In the Orlando context, tourism organizations at different sectors can be involved in marketing the destination. However, the major marketing tasks are conducted by the Orlando/Orange County Convention and Visitors Bureau (OCCVB) who are charged with the task of developing a destination image which will position their destinations in the marketplace as a viable destination for meetings and visitors. They must coordinate those constituent elements in the destination, which are quite independently diverse yet need to be homogenized, in order to create value for the destination and enhance the attractiveness and competitiveness of the destination. However, understanding the relationship between collaboration and destination competitiveness can be a challenging task since the working relationship between OCCVB and the local tourism industry is complex, multifaceted and multidimensional. Understanding key issues regarding the collaboration experience from the industry perspective will be critical to the successful operation of the destination as well as the sustained competitiveness of the destination.

## **OBJECTIVES OF THE STUDY**

This study intends to examine tourism marketing collaboration that brings together a range of parties to develop tourism marketing activities, with a focus on the collaborative marketing strategies facilitated by Orlando/Orange County Convention and Visitors Bureau (CVB) in the local destination. In particular, the purposes of the study are:

- 1) To understand what triggers cooperative behaviors of the tourism industry in Orlando;
- 2) To identify the motivations for tourism businesses/organizations in Orlando to form marketing alliances and networks;
- 3) To provide guidelines and suggestions to OCCVB in fostering and promoting collaboration within the destination in an effort to achieve competitive advantage.

## **HOW THE STUDY WAS CONDUCTED**

Based on the nature and scope of this study, interviews with informants were used as an approach of data collection. The research project was conducted in four stages: (1) Interview protocol design; (2) Interview Data collection; (3) Data analysis and interpretation; and, (4) Report writing.

Tourism businesses in Orlando as well as staff of OOCCVB were used as the sampling frame of this study. An interview protocol was developed to cover the research questions under investigation. The researcher then obtained a list of tourism businesses in different sectors in Orlando who were members of OOCCVB (about 1,500 in total). A total of 32 tourism businesses and 6 OOCCVB executives were selected for interview purposes. The interview data were recorded and transcribed for data analysis. Data analysis was conducted using appropriate qualitative data analysis techniques.

## **MAJOR FINDINGS OF THE STUDY**

### **Current environmental factors trigger more cooperative behavior**

In strategic management, it is generally accepted that organizations must adapt to their environments in order to survive and prosper. The environment can be defined as the relevant physical and social factors outside the boundary of the organization that are taken into consideration during organizational decision making. As such, tourism businesses in Orlando do not form alliances in a vacuum and their collaborative behavior are influenced and shaped by various environmental forces, which set the preconditions for these businesses enter into collaborative relationships. Interviews with OOCCVB staff and tourism industry representatives indicate that there are five important factors which trigger more cooperative behavior among the tourism industry in Orlando: (1) current economic condition, (2) crisis and major events, (3) traveling trends and changing demands of tourists, (4) intra-destination competition, (5) inter-destination competition

***Current economic condition.*** The poor economic condition in the US has had a major impact on the tourism industry firms' willingness to participate in collaborative marketing efforts. The interview indicates that under the current difficult economic conditions, businesses become more receptive to collaboration for the purposes of cost sharing in operation and advertising, generating new ideas of promoting the entire destination to boost visitation, and creating superior products to consumers. It is clear that tourism firms in Orlando have an expressed concern regarding the decrease in tourist arrivals that has occurred over the last year and a half. The marketing managers of the firms interviewed noted that this decrease in arrivals has led to scarce marketing, advertising, and promotion dollars which has directly led to the increased interest in collaborative marketing efforts with other tourism companies. The increased interest in collaborative marketing efforts with other tourism companies is reflected through the bundling of tourism services and products supplied by multiple tourism firms. This bundling of products and services may appear with "odd fit companies" (e.g. Red Canyon Grill offered a special to taxi cab drivers that would hand out coupons for the restaurant's happy hour) and/or with direct competitors (e.g. all of the restaurant companies at Pointe Plaza formed a promotion campaign together to sell the diversity of food available at the Pointe to convention attendees). The economic condition has also stimulated a dedication from tourism firms to design a superior tourist product through the bundling of services and goods with partnering tourism businesses. This trend is particularly specific but not exclusive to the hotel industry and event sectors.

***Crisis and major events.*** Tourism firms also indicated an increased interest and desire to participate in collaborative marketing efforts during times of crisis and major events (e.g. 9/11 and hurricanes). These interests were most closely tied with decreased demand seasons (hurricane season/rainy season) and a desire of the firms to help the community in times of need.

Several of the retail sector companies and theme parks indicated that weather related factors (e.g. hurricanes, persistent rain, and excessive heat) are major concerns of tourists that effect attendance rates. In order to mitigate the weather concern of the tourists these companies try to offer package deals with other tourism companies (e.g. Wet-N-Wild Water Park participated with Prime Outlet Shopping Center. The tourist could go to the water park if it was sunny and hot or to the outlet mall if it was rainy and receive discounts with the proof of ticket purchase from Wet-N-Wild. Then if it was sunny the next day, the tourist could return to Wet-N-Wild with the same ticket to enjoy a day in the park.)

The Hotel and event sectors indicated that after 9/11 other locations/destinations began to “peel away” Orlando’s group and meeting sales business. Hotels indicated that this tragedy drastically intensified their desire to collaborate in marketing efforts (with direct or indirect competition) in order to avoid losing the potential group business.

Exclusive to the event sector, the event managers interviewed noted that the increased fear in contracting an illness while traveling (e.g. Swine Flu) was impacting their firm’s willingness and motivation to collaborate with other types of firms (not necessarily tourism firms) to try and promote health safety. For example, one event management firm added value to their event proposal/bid to a national sales meeting with Enterprise Car Rental through the formation of a marketing partnership with Dr. Phillips Hospital.

***Traveling trends and changing demands of tourists.*** Emerging tourists traveling trends and fluctuating demand patterns (seasonality) of tourists and/or locals seem to also offer motivation of tourism firms (particularly the small firms) to participate in collaborative marketing efforts with other businesses. Several event and hotel firms noted that the increased demand for “green products/events” was a growing request from tourists to Orlando and the corporate meeting segment that has ultimately forced the companies to venture into agreements with other firms that are able to supply the green requests to the tourists/clients.

The hotel sector also mentioned that in lieu of the recent economic recession many of the high end travelers that were/are arriving in Orlando and would have typically stayed in a high end property were now staying in midscale hotel properties because of the travelers’ shrinking discretionary income (or fear from losing their income). The emerging hotel industry trend that transpired from the shift of room nights sold in a luxury property to a midscale property resulted in luxury properties dropping their room rates which affected the rates and RevPAR figures of all of the competitive sets under the luxury property.

It was also found that firms were more willing/motivated to participate in partnerships during times of increased sporadic demand (seasonality). The smaller attractions of Orlando most commonly mentioned that they increase partnership efforts during the peak seasons. The efforts behind the partnerships are related to the ability to provide the tourists with a “special experience” or “memorable experience” that the other major theme parks may not be able to offer because they serve the mass tourists. Contrary to the small firms, the larger tourism firms indicated that they are more apt to collaborate with another tourism company during times of decreased traveler demand (low seasons).

Lastly, several of the sectors (event, restaurant, hotel) noted that the increased cost of fuel and transportation to arrive to Orlando has detoured some of the expected tourists. To overcome this challenge/trend the tourism industry has looked to form marketing partnerships with either tour operating companies or transportation companies. For example, Disney partners with an airline company to reduce airfare available to tourists coming to Disney.

***Intra-destination competition and performance.*** It seems that the hotel, theme park, and attraction sectors noted that the level of competition within the destination has rapidly increased due to the decrease in the amount of Orlando tourist arrivals. This may also be due to the mature product life-cycle stage that Orlando is identified as being in. In order to overcome the increased level of competition from the internal marketplace firms have explored opportunities and methods to increase demand for Orlando as a destination. Increasing demand efforts have particularly been made by the hotel sector in their search for means to work with other businesses to create value-added packages in order to increase the severely depleted occupancy levels/rates. For example, Marriott partners with Universal Studios in an attempt to build a better “package deal” than Disney and both the park and the Marriott Hotels benefit. One hotel manager noted that in order to compensate for the discounts that Disney offers they must partner with other businesses because their contribution margin cannot afford to have deep room rate reduction.

At the same time, small companies in specific industry sectors are inclined to work with each other to form consortium so as not to be “smashed” by the “Orlando big guys.” For example, the smaller attraction companies who are in a disadvantage position to compete with Disney’s advertising and marketing budget form “partnerships” to share advertising costs and reach a larger audience.

From a macro economic perspective the data analysis revealed that external competition from surrounding areas is an immediate concern of not only Orlando tourism firms but also the OOCVVB. This environmental condition increases the likelihood that tourism firms are willing to work together to promote Orlando as a destination. The OOCVVB has also attempted to increase Orlando’s propensity to receive citywide events that they feel all tourism firms may benefit from by collectively incorporating hotel bands that work together to support the citywide event if it is awarded to Orlando (e.g. PCMA bid).

For example, in order to develop the hotel bands to accommodate large citywide events the OOCVVB has developed an augmented convention product by supplying the core

products needed by the citywide event (i.e. hotel rooms and restaurants), offering facilitating products (i.e. transportation companies) to easily access the core product(s), and implementing supporting products (entertainment) to provide a superior tourist product/service offering from the Orlando tourism industry as a whole. This has increased the chance that Orlando will receive a citywide event rather than have it go to Gaylord Palms alone or exclusively to Disney properties where the greater part of Orlando's tourism industry does not benefit. For instance, in the PCMA bidding efforts, through the coordination and facilitation of OOCCVB, many hotels, event management companies, and transportation companies banded together to out bid the Gaylord Palms and Disney for the city-wide event that they were also capable of hosting as standalone facilities.

***Inter-destination competition.*** Of all of the sectors interviewed, the hotel sector and the OOCCVB most readily noted that Orlando was losing business to other destinations (U.S. and Caribbean). The hotel and theme park sectors readily admitted that in order to prevent continued future loss of tourists' interests to other destinations Orlando would have to come together in a collaborative market to correctly position itself in the minds of the tourists. However, most managers also immediately followed with a frown and a statement that this collaborative effort was not practical because of "turf issues."

The event sector was very adamant that the tourism firm mind set must change from "in the market" to "market to market." Larger hotels, attractions, and theme parks also expressed that from a future perspective it is necessary to overcome external competition before the internal competition that exists in Orlando.

### **Motivations for tourism businesses/organizations in Orlando to form marketing alliances and networks**

Both the tourism business managers and CVB staff members were approached to solicit their motivation in forming marketing alliances and networks. Though variations were observed between tourism businesses, CVB as well as large and small organizations, common grounds can be found in explaining their motivation of working with each other.

***Attracting more business to the area.*** This is particularly important in the current market condition in which visitation numbers are down and many more destinations are competing for markets. As a result, tourism businesses in Orlando have to look at the bigger picture and focus on macro level competition. Many have realized that working together in attracting business to Orlando will in turn benefit each of the local businesses. In a smaller perspective as one example, the success of the I-Drive area eventually leads to potential success for individual businesses. One small attraction on the I-Drive comments that they need this area to be thriving to do well. They are not a main attraction. They are not even a blip on the radar for a lot of people that come to Orlando regarding what they want to do when they get here. They are motivated to try and stimulate activity buzz to get the tourists to leave their hotel room and come here. Therefore, they are motivated to work with other businesses to try and get this to happen. Another tourism business asserts that they support bringing business to Orlando, and they



support the role of the CVB in trying to achieve their goal of increasing traffic to the destination. The scare with the economy motivates them to work with the CVB and other businesses more to do more FAM tours, to talk to more meeting and event planners, etc.

***Cost sharing/saving for small organizations.*** Tourism firm size seems to provide indication regarding the willingness/motivation to participate in collaborative marketing efforts. Smaller tourism companies indicate that they are more apt to participate in collaborative marketing efforts, and are less likely to “believe in” the “trickle down effect” that the larger attractions claim will occur if the tourists arrive to Orlando. Smaller firms suggest that they are not able to compete with the advertising dollars afforded by the “Orlando big guys – Disney.” Therefore, small companies are more motivated to form marketing partnerships to overcome the level of competition that is amplified by the larger tourist attractions in Orlando that have larger promotions budgets. Though the level of partnerships between smaller firms varies, most of them stated that a benefit of the partnership(s) was the sharing of advertising costs that allowed the partners to have a larger advertising campaign and also allowed these firms to reach a larger target audience.

***To be politically correct.*** Several of the restaurants indicated that they are motivated to participate or co-market with the CVB in order to be simply “politically correct.” The managers indicated that they do not want to appear as though they do not support the local area or the industry so they will participate in some marketing activities knowing they are not going to receive a ROI from a sales perspective but rather in a favorable community perspective. This mentality is probably best illustrated by the following comments from a restaurant: “Honestly, we do it to be “politically correct” – we are supposed to support our local area and the tourism industry. The hotels, the theme parks, etc. benefit from being members of the CVB. People don’t look through the CVB magazines for a place to eat. They walk out the hotel and say, “Oh, let’s go there...that restaurant is close and doesn’t look too busy. Honestly, next year we may choose not to be members.”

***Scarce resources and the potential to increase revenue.*** All of the sectors indicated in their interviews that a “logical” motivational factor to participate in a co-marketing effort is directly linked to their anticipation/expectation/desire to make more money, increase sales, profits, revenues, traffic, etc. Interestingly enough, while the “What’s in it for me mentality” (WIFM) was a popular answer throughout most sectors for this question this is also the line of thought/mentality that hinted a factor that jeopardized the success of a collaborative relationship. Answers for this question can also trace back to environmental factors triggering collaboration, in particular in regarding to the economic recession and the lack of resources under which companies have to try and market to their target audiences even harder owing to decreased tourists arriving to Orlando. It seems that the environmental factors being experienced by tourism firms are directly related to what motivates these firms to participate in collaborative marketing opportunities. To a great extent, the collaboration behavior is very revenue driven. Many businesses use the CVB as a political tool, some are more successful than others. In this process, organizations

who are politically connected and have a lot to say are driving the dollars towards certain areas.

***Better serving customer needs.*** No customers, no business. Companies realize that satisfied customers have a potential to lead to return purchase or return visitation. This not only helps individual businesses but also the destination as a whole. One business states that “better serving customer need is huge because the better partnership we have the more we can offer to our clients. Maybe I don’t get commission for an activity but if I know someone through that I can steer them through a CVB or through whatever the organization is at the destination. That makes us look good and clients are happy which is to everyone’s benefit.” Others realize that working together enables them to expand their product lines to better serve customers needs. They understand that anytime they meet customers needs increases their ability to depend on that customers to return, and that when they experience something that they are passionate about, their involvement is satisfying beyond the satisfaction of developing relationships and partnerships that are there for the benefit of everyone. As they help people get what they need and want, they help the entire area and everyone benefits.

***To best serve members needs.*** The CVB seemed primarily concerned with maintaining the satisfaction of their members and best serving their needs through attracting as many tourists/travelers to Orlando as possible. The CVB indicated that they were most motivated to work along with another CVB (regional/international) or organization that would assist them in delivering more customers to their members. With the local industry the CVB is motivated for co-marketing relationships in terms of maintaining their membership and keeping the members satisfied. If they view their memberships as valuable and the CVB needs to fulfill that view, especially when they bundle their monetary resources they realize that they can do so much more as far as attracting people to come to Orlando.

***To keep the CVB legitimate as a central governing marketing force of Orlando.*** The CVB employees also indicated that the large firms cannot market together because of the collusion they hold against each other. Therefore, the role of the CVB is to assume the legitimate position as the central and neutral force to negotiate the marketing relationships between the large tourism firms in Orlando and to do so as fairly as possible for all members. In other words, the big companies usually cannot work with each on various co-marketing projects because of the suspicion they hold of each other; therefore, CVB assistance is usually needed to arrange such partnerships so that a monopoly in the industry does not occur.

### **Suggestions to OOCVB in fostering and promoting collaboration to achieve competitive advantage.**

Tourism competitiveness has to be seen in a context of fostering destination prosperity. From a supply side perspective, many factors can play important roles in enhancing the competitiveness of a destination, such as destination appeal, the composition of the destination organizations, destination marketing and management, destination

information dissemination, and product and service delivery, etc. From a demand side approach, destination competitiveness should be understood as the ability of a destination to deliver customer value which usually implies complex combinations of economic and psychological elements related to the travel experience. In this value creation and delivery process, coordination and collaboration in destination marketing activities are the key to success. However, many issues and challenges remain unanswered as to how to build, develop, and maintain marketing networks in a local destination. This study is designed to illuminate the local CVB (OCCVB) as to what strategies they need to take in order to get the different sectors of the local tourism industry actively involved in marketing activities and take advantage of the power of networking externalities in their destination marketing endeavor. The following guidelines are provided to the local CVB for their future efforts in building the collaboration spirits in the local destination.

***Positioning.*** Many businesses and organizations are involved in destination marketing, but it is not often very clear for many destinations where the major responsibility of destination marketing lies. Depending on the structure of the local tourism economy, it could be the municipality (e.g., tourism offices under chamber of commerce), the most important company/companies at the destination (e.g., Disney World in Orlando), or some organizational entity like a tourism board/CVB. It is clearly demonstrated in this study that OCCVB, together with other major tourism businesses in the area, is regarded by most of the industry representatives as the umbrella destination marketing organization responsible for the destination's tourism as a whole and function to coordinate various activities within the destination as a product. However, taking up such a responsibility is not an easy job and many challenges may arise. First, CVB has to completely understand its function and find its position in the local destination. It is indicated in the study that CVB might lose its credibility if it positions its function too broad so that most of the stakeholders do not feel its relevance, or too selective in only including the few big tourism businesses such as Disney World, Universal Studio, and Sea World, so that most of the other tourism businesses feel marginalized, or too narrow so that it falls into the trap of losing the general direction and committing only to triviality. It is suggested that CVB should keep a balance of the following functions: 1) establishing the long-term strategy for the destination; 2) representing the stakeholder in the local community; 3) marketing and promoting the local destination; 4) coordinating supply side activities; and 5) Creating value for the destination.

***Creating value for the destination in creating networks.*** As a matter of fact, all the other functions should serve the purpose of the last function of a CVB: value creation for the destination. In a destination, value creation is achieved through the collection of discrete service providers – the value network. CVB's role is to find out ways to create, maintain, and expand this value network so that the destination becomes more competitive. In other words, CVB needs to position itself more as the network administrative organization for the local community, a function which might be, to some extent, deviant from the traditional DMO hat that CVB usually has, but proves to be very important and crucial in building and facilitating the collaboration efforts. Owing to the diverse interests of the local tourism businesses, the growth and maintenance of the local marketing efforts should be led, coordinated, and governed by a local administrative entity which is fair,

neutral and representative, and CVB is the only entity in the local destination who can take up this role as the network administrative organization in the eyes of the individual businesses. In this case, CVB can be both the agent of the community and the principal of the network participants and make efforts to try to attract and retain individual tourism businesses as members in whatever marketing networks they work on, especially during the early initiation and growth period, so that the network can survive in a viable format and serve the marketing purposes of the network. Obviously, some strategies are required to creating and maintaining the marketing networks.

***Justification of cooperative marketing programs.*** Although collaborative marketing programs are initiated through the efforts of both the CVB and individual tourism businesses, when people come together to implement these programs, they are still committed to the interests of the individual businesses they represent. However, it is important for the CVB to educate the individual businesses to reinforce the program justification/rationale so that they can be also committed to the idea of collaborative marketing programs to achieve actions not achievable through individual efforts. This program justification will help counterbalances the commitments to their individual organizations so that they can recognize the legitimacy of the program. This program justification/rationale can not only be conceived of as the motivational glue that holds the members in a marketing program together and as a central feature in reaching agreements and joint solutions, but also can direct members' attention to the importance of program-centered, holistic view of the whole efforts.

***Trust building.*** In the process of collaboration building, the challenge facing the CVB is how to build trust in an arena in which each member has self-interest. It might be the case that trust is built up over time in a collaborative program more formally, or relationships are developed through more informal networks. Whatever the case is, over time, people learn from experience and they form alliances of mutual respect and trust based on these relations. In effect, reciprocity of trust builds up over time. In this way, relations between people in marketing programs become a source of social capital, and this social capital continues to accumulate as a result of ongoing relations. In addition, working together in marketing program allows members, through face-to-face contacts, to learn more about each other. Barriers based on lack of information or, even worse, misinformation about individual members can begin to be broken down. Sometimes although members were aware of the presence of other organizations in a program, they never appreciated how similar their problems were until the program was formed and they began to meet with each other regularly.

***Conflict management.*** The question of how to control conflict in an interorganizational network is also raised in the study. Attempts to answer this question lead to what appears to be an obvious truth, although people in a marketing program often ignore it. This truth is that members of a marketing program are also members of individual businesses. Even if all members are committed to the marketing program, they still feel a pull away from this commitment toward their individual businesses' interests. Conflict occurs when the commitment to a member's individual business runs counter to the commitment to the whole marketing program. The challenge for the CVB is really to maintain the

independence and integrity of the member organizations while still providing a vehicle for collaborative actions. CVB needs to understand that the creation and perpetuation of a marketing network is based on the ability to mobilize resources in such a way that individual actors can satisfy their own interests while working toward the program's goals. Rather than how to control conflict, what the CVB really needs to understand is: how they can develop and encourage commitment to the program without ignoring the commitment to the individual businesses? To accomplish this, the CVB has to always take the interest of the individual businesses into consideration while planning for what they called the 'big picture'.

***Free rider problem.*** Collaborative destination marketing tend to benefit all sectors of the tourist industry in the destination concerned, and in this sense it becomes a 'public good'. The public dilemma faced by CVB as the organizer of collective marketing efforts is that the benefits of collective action will accrue to all regardless whether or not a specific individual business participates. The question of 'free riders' thus arises, for they too will benefit along with those who may have contributed directly to the promotional campaign. As a matter of fact, free riding has bedeviled destination marketing for many places, big and small. Without a doubt, interdependence and the smallness of many tourist operators are forces leading towards united action, particularly given the costs and difficulties of penetrating distant markets. However, at the same time free riding and the common good element of destination marketing, reinforced again by the smallness of operators and their unwillingness to spend on what is not perceived to be 'necessary', have led to a reluctance to participate freely in joint activity. CVB needs to come up with ways to encourage active participation in whatever marketing programs they initiate and control the free riding sentiment to a minimal level.

In conclusion, the development of a holistic marketing image, targeting of specific market segments and execution of collective marketing plans that result in destination competitiveness do not happen in vacuum. They require thoughtful planning, knowledgeable and skilled professionals, viable travel product and resources. But more importantly, they require partnerships and collaboration between the public and private sectors, between normally competitive entities such as hotels, restaurants, attractions, and other diverse constituents within a destination. In order to meet the challenges of a growing competitive marketplace, the CVB must engage in a dynamic partnership that includes all the critical elements of a growing travel and tourism industry. Without the partnership, a bureau cannot effectively fulfill its mission and marketing responsibilities. However, CVB has faced the challenges of relating to many diverse constituents. Each group has its own interests and agenda, though they are often not that different from what the bureau is attempting to accomplish. But the competitive spirit often confuses the need for cooperation and mutually supportive marketing activities. At times, relating to all of these constituents seems like an enormous undertaking, especially considering the size and diversity of Orlando as a destination. But the bureau must work with all groups, sharing their visions for the community and the destination, gaining their confidence and understanding, and planning together their diverse agendas into a cohesive image and presentation on behalf of the community. This may take time and an abundance of patience, but the end result will be affirming and exciting.

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