Part Eight

Conclusions

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At the end of such a long, complex and wide-ranging text, attempting to draw conclusions is a necessary but awesome task. Perhaps the only real conclusion we can draw is that there are no generally applicable conclusions. However, this is too trite a statement, and we feel we must endeavour to pull together some broad conclusions for the benefit of readers.

Before going to outline these conclusions in some detail, we would like to begin by seeing how the book has, in our opinion, lived up to the objectives set out in the preface. However, it is for readers to decide how successful we have been in this respect, though we believe we have produced a text which is truly international in flavour, particularly through the case studies and examples that have been used. We have attempted to illustrate the many facets of leisure marketing in this far-ranging text.

In *Part 1* of the book we tried to define the *marketing concept* and considered both the philosophy of marketing and the practical application as a management discipline. In Chapter 2 we also defined the term leisure and attempted to look at the concept of leisure time and began to consider the types of organisations that offer leisure experiences.

In the early part of the book, we also saw that there are *significant differences between leisure* in terms of marketing. These differences cover products, organisations, markets and marketing techniques. Furthermore, even within each of these fields, we have seen that there can be significant variations in marketing practice. These are, perhaps, most noticeable in relation to the following criteria:

- The *marketing objectives* of organisations which tend to vary depending on whether the organisation is in the private, public or voluntary sector. This characteristic can also reinforce the differences between our three fields, for the private sector is much more powerful in tourism and hospitality than it is in many forms of leisure.

- The *size of organisations* ranging from small one-person enterprises to massive trans-national corporations. Marketing in the latter type of organisation is usually well funded, heavily planned and carried out by specialist staff. In the case of small businesses, on the other hand, marketing often has limited budgets, is opportunistic rather than planned and is usually carried out by the entrepreneur themselves, who may have little or no specialist marketing expertise.

In *Part 2* we looked at *consumers*, *markets*, *industry structure* and the *business environment* of the leisure sector. While we were able to use copious examples from different countries, it was not always easy to see a great deal of homogeneity.

If we talk about markets and consumer behaviour, there is currently a generally heterogeneous situation. A French tourist, for example, still behaves differently to a British tourist. He or she is more likely to holiday in August, to stay in their own country for their main holiday and to shun the package holiday in favour of more independent forms of holidaymaking. However, we suggest that this heterogeneity is not the same as saying each country is very different.

Furthermore, we believe that trends are taking place which are making the picture more complex and perhaps leading to more homogeneity. For example:

- Certain *niche markets* or *market segments* are developing which appear to be more international in nature than we have seen previously. Examples of these include the student traveller, who travels on study exchanges and then takes side trips from their study base.

    There also appears to be shared behavioural characteristics amongst many youth travellers, in general, such as the 'hedonists' of Northern Europe. It is perhaps not surprising that the younger generation, with its greater language skills and lack of memories of wars past, is taking the lead in this trend.
- There is growth in the *business tourism* market where consumer behaviour and demand patterns appear to show less variation than is the case with leisure travel. Perhaps this is because these travellers do not choose where, when and how they travel and are not motivated by a pleasure imperative. It is largely a utilitarian activity. Furthermore, much business travel is undertaken by employees of multinational companies who are by nature more international than national in outlook.
- The continuing *globalisation* of the media is playing an increasing role in influencing consumer behaviour in leisure.
- As more and more citizens become *experienced tourists*, they are alike in seeking ever-more unusual new experiences and more flexibility from leisure providers.
- *International regulations* are slowly standardising a range of factors within members' countries which affect leisure marketing. These vary from controls on working hours to social benefits and consumer protection legislation.
- Many *new leisure activities* are sweeping across the world, usually backed by huge promotional campaigns undertaken from major transnational corporations. These include everything from computer games to karaoke!

This is just a brief, selective list but it does indicate the range of such factors that are currently influencing leisure markets.

Clearly, there are links between trends in consumer behaviour and the *supply side*. Consumers can only buy what industries offer while organisations are always seeking to vary their offers in response to changing consumer preferences.

In Chapter 4 we identified several important issues in relation to the supply side, in other words, the industrial structure of leisure. These included:

- the polarisation between small businesses and large corporations;
- the growth of transnational companies;
- the ongoing process of industrial concentration.

Chapter 5 went on to look at the *international business environment* and concluded that it is still largely heterogeneous in relation to leisure. However, again we noted trends which will lead to greater standardisation, including the following:

- technological developments which are truly global and for which geographical boundaries are of little relevance;
- political changes like the harmonisation policies of the European Commission and the introduction of market or semi-market economies in Eastern Europe;
- the process of economic globalisation;
- the growth of more and more standardised approaches to management, education and training.

In the next section of the book, *Part 3*, we examined the application of the concept of the marketing mix to leisure. This resulted in the following points being identified:

1. The *product* in all cases is intangible, a service, but it usually has tangible elements like the food in a restaurant or the seat on an aircraft.
2. The *benefits* which the product bestows on the consumer vary between different sectors within leisure.
3. The same *pricing* mechanisms are available to most organisations but some show a preference for discounting for tactical marketing reasons while others offer concessions for social reasons.
4. *Place* or distribution comes in both forms namely direct from producer to consumer and via an intermediary such as a travel agent.
5. While the range of potential *promotional techniques* is very similar for all organisations, they are used in different ways within different sectors. The main reason for this difference appears to be budgetary but there may well be others, notably the nature of the product, the size of the market and the price of the product.

In *Part 4* we looked at the *marketing planning process* in relation to leisure. Using examples, we looked at how organisations seek to answer four questions, namely:

- where are we now?
- where are we going?
- how will we get there?
- when will we know when we have arrived?

However, as was indicated in Part 4, doubts have been expressed about the validity of traditional marketing planning in leisure mainly due to the volatility of the business environment.

Nevertheless, we did see that marketing planning is used by leisure organisations, and we examined some of the issues involved in implementing such an approach.

Part 5 was where we looked at a range of *individual sectors* within leisure. This was very illuminating, for we believe that in terms of the practice of marketing there are greater differences between the sectors of leisure than there are between countries. Three examples will illustrate this point as follows:

- The *benefits sought* by those taking part in countryside recreation in Greece and Britain are probably similar but the benefits sought by Greek people from a restaurant meal or a shopping trip are likely to be very different.

- *Methods of distribution* are usually similar within the same sector in different countries, although to different degrees. For instance, most package holidays in France are sold through travel agents just as they are in the UK. However, in neither country nor in any other European country do travel agents play a significant role in the sale of tickets to visitor attractions, for example.
- The *promotional techniques* used are often similar between organisations in different countries within one sector. Airlines and hotel chains advertise widely while most museums rarely do. Tour operators across Europe tend to rely heavily on glossy brochures or catalogues, while the main promotional literature of airlines tend to be their information-packed brochures.

That is not to say, however, that there are not significant differences between countries in terms of the marketing mix in some respect. All four elements of the mix are affected by a range of factors that can create major national differences in the framework within which the marketing mix is manipulated. Many of these factors are political and governmental and include laws on advertising, price controls and restrictions, or the lack of them, on the use of marketing intermediaries.

In *Part 6* we highlighted five topical issues within leisure marketing, namely competition, quality, ethics and social responsibility and marketing research. Even in a fashion-conscious area like marketing, these five areas stand out as being ones which are particularly exercising the attention of both academics and managers.

Two interesting points emerged from our examination of these topical issues, namely:

- *they are interrelated*, in other words, quality is a way of achieving competitive advantage and green issues are an ethical challenge for leisure organisations;
- *all of them put the customer at the centre*. Organisations are interested in quality, green issues and ethics because they think these things are important to their customers. Competitive advantage is seen in terms of offering customers more benefits or different benefits to those offered by competitors. Lastly, marketing research is seen as crucial because we need to know who the customer is and what they are looking for in order to be effective and successful in marketing terms.

In the last section, *Part 7*, we sought to place leisure in a wider context. This led to some interesting conclusions as follows:

- *marketing in leisure is very similar to that in many other industries*. There are few characteristics of marketing within leisure that are not also found in at least one or two other industries;
- *continents such as Europe are no longer – if they ever were – closed systems*. It is involved in a two-way relationship with the rest of the world. Indeed some might argue that globalisation is making the concept of Europe and Europeanisation obsolete before they have even become a reality.

General conclusion

Having drawn conclusions from each section of the book, it is now time to look at more general points that have arisen from the book.

First, *marketing in leisure is a very complex and diverse field*. This diversity reflects a number of factors including:

- the differing objectives of organisations in the public, private and voluntary sectors;
- the variations in markets in terms of their size and the extent to which they are free or regulated;
- the size and resources of organisations;
- whether the organisation operates on a purely domestic level or is transnational.

Leisure marketing is increasingly becoming a global pursuit. Leisure organisations are increasingly finding themselves developing standardised marketing programmes as a result of a series of factors as follows:

- the enlargement of the European Union and the creation of a Single Market;
- the activities of transnational companies;
- management training and international education programmes which are spreading similar messages about leisure marketing from Iceland to Italy, and from the Azores to Albania;
- technological developments which are making national boundaries less and less meaningful.

This last point has also to be put in the context of the steady march of globalisation. In the emerging world order, Europe's traditionally strong position in the world of leisure is clearly threatened by the rise of new geographical areas, most notably the countries of the Pacific Rim.

Whether or not the reader believes this book has achieved its original objectives, it has, hopefully, highlighted the fact that leisure marketing is a fascinating and increasingly sophisticated field which merits more study by academics. We have not as yet even started to dig under the surface of this deep and ever-changing field. Such studies should also seek to place marketing in the context of trends in marketing in other industries.

These conclusions are part of a continuum – they reflect trends that began some time ago and will carry on in some form into the future.