

## **Evolving landscape of partnerships of US destination marketing websites: external hyperlinks from 1999-2018**

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### Abstract

Hyperlinks to external websites are a reflection of partnerships of destination marketing organizations (DMOs). This longitudinal study investigates the external hyperlinks placed on the home page of US state tourism websites from 1999 to 2018. Our analysis shows that the landscape of DMO partnerships underwent considerable growth; however, the growth was distributed unevenly among categories of partners, particularly as social media became increasingly dominant. State DMOs appeared to be changing their external partnerships quite often, while their strategy was likely influenced by technological innovation, policy, and destination specific issues. Based on these findings we discuss the study implications and provide suggestions for future research.

## Keywords

Hyperlinks, partnerships, collaborative destination marketing, destination marketing organizations, US state tourism websites, longitudinal research

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## Highlights

- The composition of partnerships of US state tourism offices changed from 1999-2018
- Year 2008 was an inflection point in online marketing likely due to social media
- The number of partnerships increased substantially but with uneven distribution
- US state tourism offices did not act in unison, suggesting idiosyncratic challenges

## INTRODUCTION

The online presence of destination marketing organizations (DMOs) has been one of the central foci in the tourism marketing literature since the early adoption of the Internet as a marketing and advertising channel for tourist destinations for a variety of reasons (Gretzel, Fesenmaier, Formica, & O'Leary, 2006). Primarily, DMOs play the role of a liaison between the supply side of tourism and the visitor market, and their websites facilitate access to “amalgams of tourism products, offering an integrated experience to consumers” (Buhalis, 2000). Destination marketing thus is collaborative in nature and requires DMOs to work with partners to best promote the destination (Wang & Fesenmaier, 2007). Such partnerships are critical for destination competitiveness, and tourism scholar have studied partnerships from multiple perspectives spanning from the conceptualization of marketing alliances (Wang & Xiang, 2007) to collaborative networks for innovation (Zach & Hill, 2017).

As suggested by Gretzel et al. (2006) and others, opportunities and threats in the external environment (social, political, and technological), and changes in the industry's markets and structures require DMOs to seek new partners to manage and market the destination. Past studies on collaborative destination marketing, particularly partnership networks based on web presence, provide critical insights on DMO management, albeit only for one point in time (e.g. Baggio, 2020; Trunfio & Della Lucia, 2018). This study documents the evolution of DMO partnerships as reflected in the external (i.e., outbound) hyperlinks on their websites by utilizing longitudinal

data of twenty years (1999-2018) collected from state tourism offices in the United States. It contributes to our understanding of collaborative destination marketing by providing empirical evidence on how DMOs make strategic choices in terms of partnerships in response to external changes. During this time period, there were significant developments in technological innovations and, as such, this study contributes to our understanding of diffusion of innovations (Rogers, Singhal, & Quinlan, 2008) within the DMO ecosystem as they adopted technology-enabled marketing strategies and practices. This study also offers a response to a recent call for longitudinal perspectives on tourism partnerships (Adie, Amore, & Hall, 2022).

### EVOLVING LANDSCAPE OF DMO WEBSITE PARTNERSHIPS

The extent of collaboration and cooperation is an important determinant for the development of a tourism destination and, as such, the identification of a destination's network is particularly important for uncovering patterns of cooperation and collaboration in a destination (Baggio, 2020). Since the advent of the Internet, destination marketers have created, maintained, and updated their websites to attract potential visitors. To promote the destination Wang (2008) argues that DMOs collaborate with stakeholders, that is, organizations that can affect, or are affected by, tourism in the destination (Freeman, 1984; e.g. Wang, 2008). These partnerships evolve over time whereby continuity is likely determined by both internal and external factors such as budget (Johar, Tan, Maung, & Douglas, 2022), political pressures (Ooi, 2004) and technological change (Buhalis, 2000), to name just a few. In the last two decades or so, such environmental changes included the 2008 financial crisis, the adoption of Internet technology and subsequently of the near "free-to-use" social media by DMOs, and the release of the first smartphone (i.e., iPhone in 2007).

The adoption of Internet technology, in particular, allowed marketers to build interactive websites to leverage the richness of the new media. During the early days of the Internet, when destination marketing switched from predominantly printed brochures and catalogues to websites, DMOs, ironically, distributed more brochures and catalogues as potential visitors used the DMO website to request them as they had more trust in print materials. As a result, DMOs added new partners who were critical to operating a website while maintaining relationships with offline partners. Over time, however, DMOs stopped mailing brochures and catalogues and thus ended some of these relationships. As social media emerged as a significant component of the online tourism domain (Xiang & Gretzel, 2010), it became nearly a requirement for DMOs to utilize social media channels (Chu, Deng, & Cheng, 2020; Xiang & Gretzel, 2010). It is conceivable that DMOs not only added hyperlinks to social media, but also did so at the expense of hyperlinks to other partners.

To our knowledge there is a lack of research that takes a longitudinal view to assess how technology change affected DMOs' marketing partnerships. Particularly, the composition of online partnerships is of strategic importance, because, while adding partners is essentially free online, it also bears costs of maintenance and risk of alienating existing partners. External hyperlinks on DMO websites represent stakeholders enabling DMOs to best market the

destination. As such, hyperlinks can be used to understand DMO networking patterns and strategies (Baggio, 2020; Raisi, Baggio, Barratt-Pugh, & Willson, 2017). The choice of tourism partners is thus a strategic decision in terms of the values these partners provide (d'Angella & Go, 2009). It is also a technological decision to keep up with internet developments such as social media (Zach, Xiang, & Baggio, 2019).

To understand the evolving landscape of DMO website partnerships and its implications for collaborative destination marketing, this study draws upon two sources of theoretical arguments on destination partnerships. The first is the dynamic process view of collaborative destination marketing (Wang, 2008), which argues that partnerships will not remain static, and they occur because the domain of tourism development are both a business and political process in which needs, demands, and values of a diverse number of stakeholders have an impact on the landscape of partnerships. The second is the stakeholder engagement view (Trunfio & Della Lucia, 2018), which identifies the variety of partnerships in the digital era from passive ones such as e-information and consultation to active ones such as e-participation in the form of social media that potentially lead to shared destination governance.

## METHODOLOGY

We conducted an analysis of external hyperlinks on the home pages of US state tourism websites with one home page per state per year from their first online presence until December 31, 2018. A home page is the default landing page when a visitor comes to a website and thus is the face of the website. It is thus likely to show the most relevant partnerships. Data was provided in HTML format by the Internet Archive (<https://web.archive.org>), which is a repository of websites. The first recorded pages are from 1996, but nearly all states were available only since 1999. Not all websites were captured every year, particularly in early years of the Internet.

Using a script, we analyzed the HTML data and identified 3,404 unique hyperlinks to external websites; of these 1,652 (48%) were used only in all years. Following Smith (1988), the remaining 1,752 external hyperlinks that were used more than once were categorized based on the North American Industry Classification System (NAICS). Two authors coded the external hyperlinks, and the third author was consulted in case of disagreement. The hyperlinks were coded based on their earliest occurrence and based on the website they link to. For example, a hyperlink pointing to an airport was coded as "Transportation". We used descriptive analyses to show how different categories of partnerships evolved over time. Also, we employed a bipartite, recursively induced modularity algorithm (Barber, 2007) using a five-year time window to cluster states and external website categories to identify the dominant trends for each state.

## FINDINGS

Table 1 shows the average number of unique external hyperlinks per state tourism home page from 1999-2018. As can be seen, while there was, in general, a continuous expansion during the study period with substantial growth taking place after year 2009.

**Table 1.** State tourism home pages and sum of unique hyperlinks

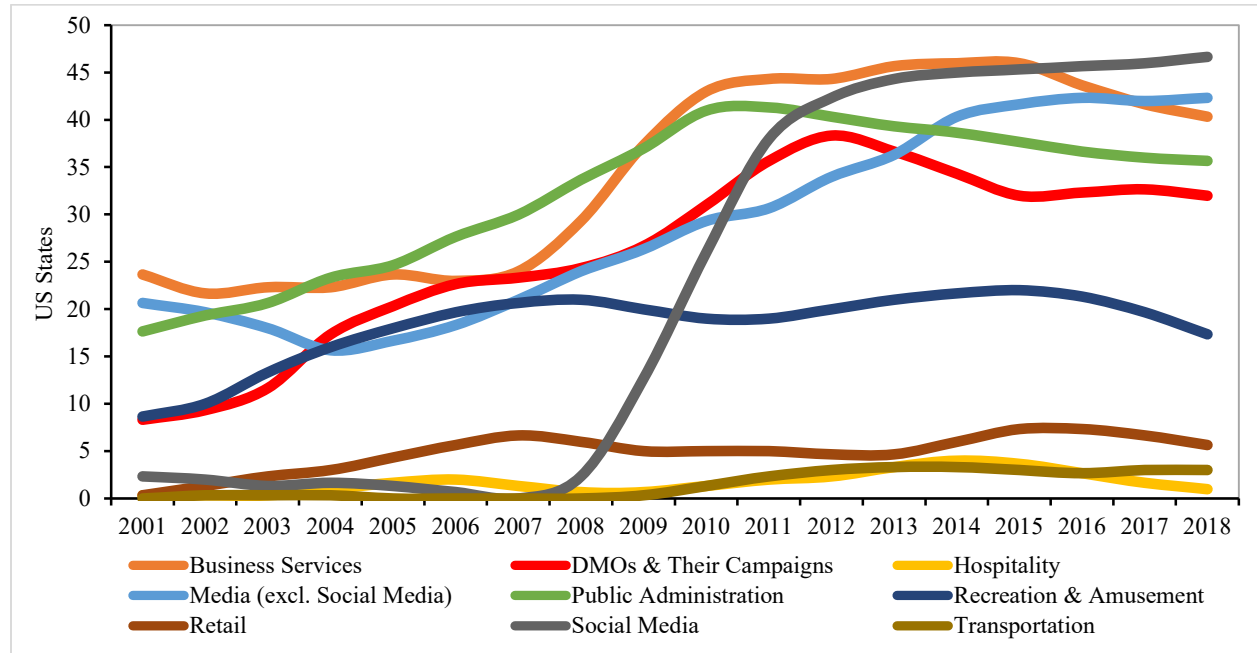
<b>Year</b>	<b>Mean unique hyperlinks per state home page</b>
1999	21
2000	37
2001	31
2002	43
2003	46
2004	53
2005	69
2006	73
2007	75
2008	76
2009	97
2010	159
2011	201
2012	225
2013	243
2014	271
2015	288
2016	296
2017	280
2018	218

Figure 1 displays state websites' use of at least one hyperlink (that was used twice in all study years) in the identified categories. There are primarily three trends. First, there was a rapid, substantial growth of external hyperlinks to Social Media. External hyperlinks to Business Services (e.g., specific tourism business services, such as survey platforms, travel industry associations, and travel agencies) also grew considerably. These websites allowed leveraging private firm websites that provided services the state DMOs could no longer offered following the 2008 Global Financial Recession, for example, travel planning.

Second, we found initial increases followed by prolonged decreases of hyperlinks in categories such as Public Administration (e.g., STATE.gov, department of commerce of a state), Media (e.g., TV, newspapers, magazines), local, regional, and state DMO & Their Campaigns websites (e.g., ski-STATE.com), and Recreation & Amusement. Interestingly, despite the growth of social media, traditional media websites such as TV, newspapers or magazines experienced continuous growth since 2004.

Finally, relatively speaking, categories such as Transportation, Hospitality and Retail were small. The lack of hyperlinks to these categories suggests that, despite their importance for the destination experience, they might be considered not critical enough to be included on DMO home pages.

**Figure 1.** Count of external website categories linked to by US state tourism websites (three-year smoothing)



**Figure 2.** Share of hyperlinks by categories as percent of all external hyperlinks across all US state tourism websites

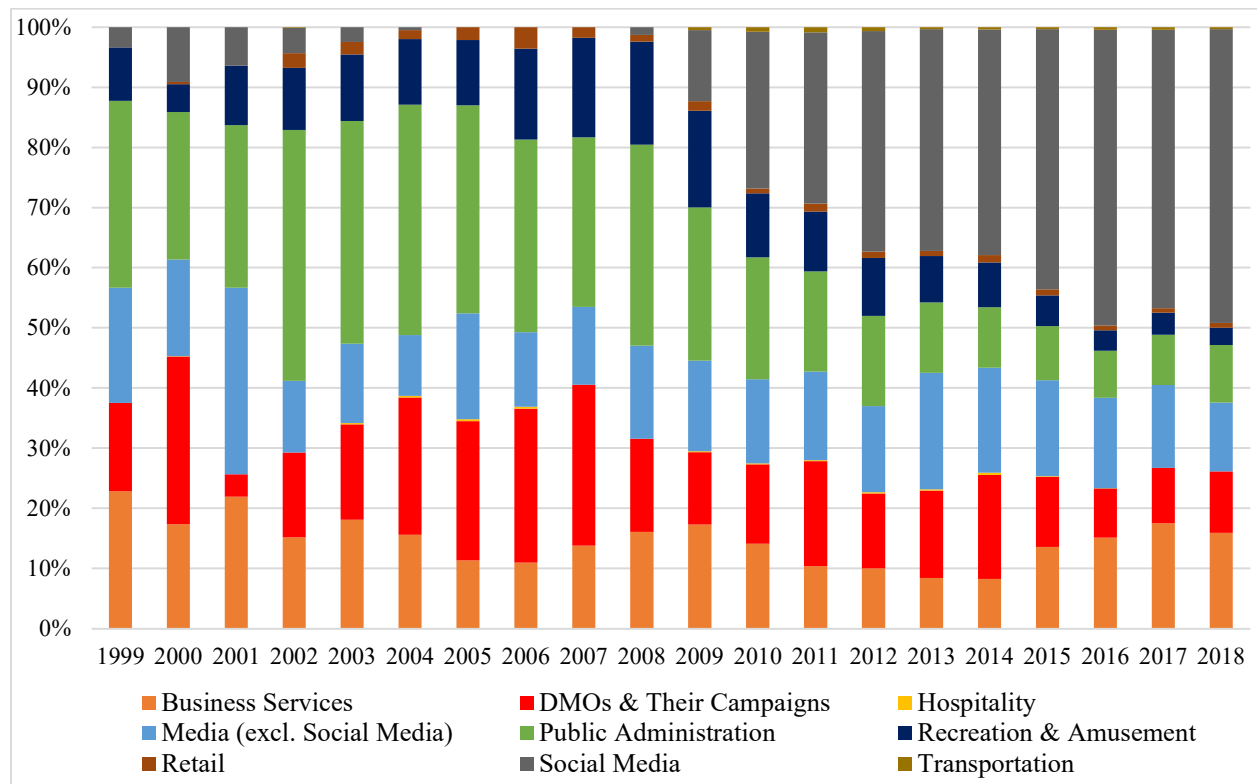
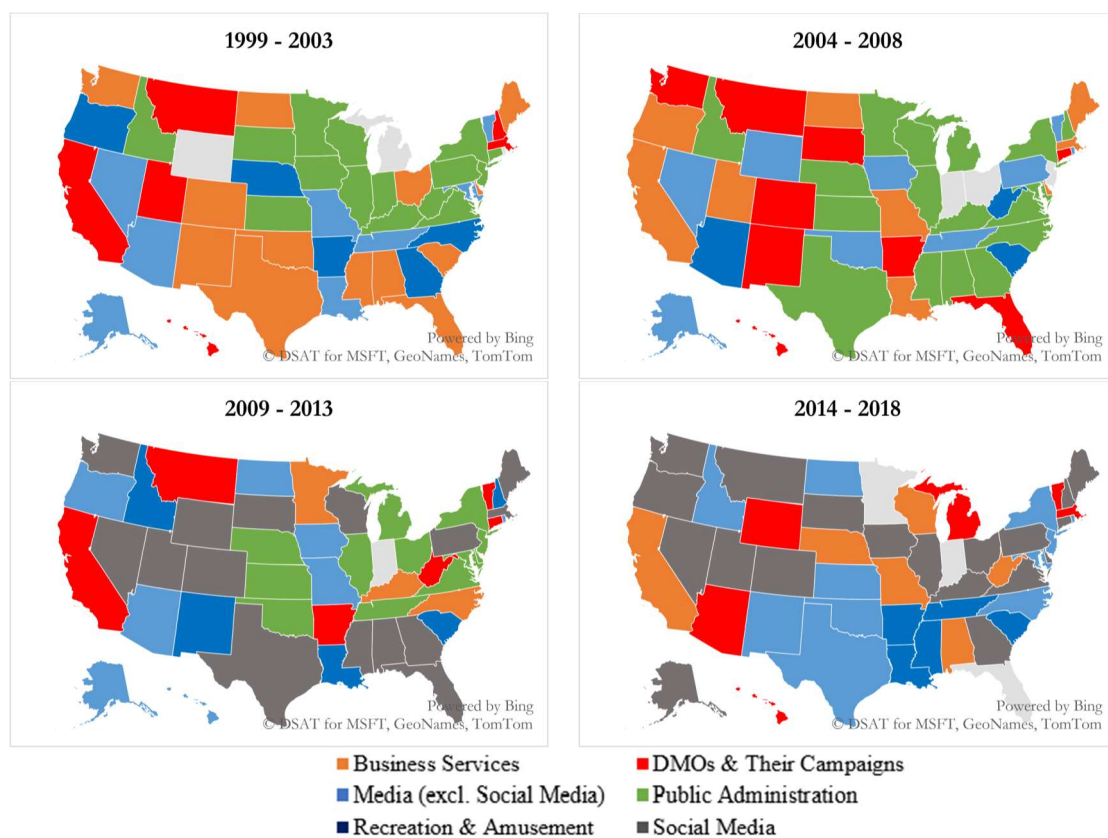


Figure 2 shows the share of external hyperlink categories. Hospitality and Transportation accounted for less than one percent, while Retail reached a maximum of only 3.6% for all study years. Media (excluding Social Media) represented a fairly consistent share between 15% and 19% for the study period, while Social Media gained in significance since 2008 and represented nearly half (48.8%) of all the external hyperlinks in 2018. This gain came at the expense of hyperlinks to Public Administration, Recreation & Amusement, and Business Services. Local, regional, and state DMOs & Their Campaigns lost shares towards the mid-2000s and early 2010s.

**Figure 3.** Categories of hyperlinks used the most during a five-year period (states in light gray did not have data).



Finally, Figure 3 shows the hyperlink category linked to the most on each state DMO home page for four five-year periods. As can be seen, there is little to no consistency for state DMOs to keep the same category throughout the study period. Indeed, not a single state kept the same category for all four periods. Other than a couple of states that kept some level of consistency (for example, Kansas, which had the Public Administration category the first three periods), there were several states such as California that “flipped” back and forth. The first two periods of hyperlinks on DMO home pages were dominated by Public Administration and Business Services. They were replaced by the dominance of Social Media and Media, suggesting a

pronounced shift in partnerships, albeit one not consistently pursued by all DMOs. Overall, it seems that US state DMOs did not act in unison, which was likely due to idiosyncratic, policy-related issues and/or because they were at different stages in their online marketing development.

## CONCLUSIONS

This study used longitudinal data of external hyperlinks on state DMO landing pages to understand the evolving landscape of partnerships. Our analysis clearly shows that, during the study period, this landscape underwent considerable growth in that the total number of partnerships substantially increased. However, the growth of partnerships was distributed unevenly among categories of partners. Our study makes several contributions to our understanding of collaborative destination marketing in the online context.

First, longitudinally speaking, state DMOs appeared to be dynamic as they updated their external partnerships quite often. This suggests that DMOs are strategic towards establishing online partnerships. Essentially, DMOs could add an unlimited number of hyperlinks due to the low cost of technology. However, they seem to prioritize by including only the ones they need. This indicates that there might be a cost associated with maintaining these partnerships offline for political or business-related purposes. This confirms the dynamic process view (Wang, 2008) which argues that destination partnerships tend to change over time, likely influenced by technology, policy, and destination specific issues.

Second, while the composition of partnerships and the weight of each category varied over the years, the rapid growth of social media from 2009 as the dominant category seems to be universal. This clearly suggests that there were major paradigm shifts in collaborative destination marketing due to the diffusion of Internet-based technology (Buhalis, 2000; Milwood, Marchiori, & Zach, 2013; Xiang & Gretzel, 2010). DMOs leveraged social media and, to a great extent, “outsourced” content creation at the expense of other online partnerships. This is reflective of the move towards experiential marketing and DMOs’ efforts to affiliate with partners that contribute to such strategies. From our data it is unclear if social media content creators are destination visitors, local businesses, or DMOs themselves. Nevertheless, the shift to social media is in line with Xiang and Gretzel (2010) who argued that potential visitors started to consume information differently by accessing DMO websites from social media platforms. This shifted collaborative destination marketing from the supply side representation of the tourism industry to a new approach that primarily focuses on experiences represented in social media (Tussyadiah, 2014). From the stakeholder engagement view (Trunfio & Della Lucia, 2018), this also suggests that DMO websites are making transition from the early days of offering e-information in the form of e-brochures of industry partners to a more active, socially-constructed structure that invites participation and collaboration.



Third, as argued by Adie et al. (2022), longitudinal approaches to destination partnerships are worthwhile to attain a better understanding of change and of persistent behavior. While this study does not offer specific recommendations for DMOs to improve their online strategy, it demonstrates the potential to use archival hyperlink data to develop analytical tools for DMOs to gain insights into their online collaborative strategies, historically and against their peers.

Future research should focus on how internal and external factors drive the online presence of DMOs, especially during and after the global COVID pandemic as destinations are seeking partnerships for short-term recovery and long-term resiliency and sustainability (Gössling, Scott, & Hall, 2021). Given the ongoing significance of social media in driving destination marketing, future research should expand to include curated user-generated content as an increasingly important, diverse component of the destination image projected on a DMO website in order to understand the collaborative nature of destination marketing. Future research can also aim at leveraging this data to identify linkages between online partnerships and other input/output variables such as a DMO's marketing budget and destination performance for DMOs to better understand the effectiveness of their online marketing strategy.

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