



Scotland's Malt Whisky Trail

Management issues in a public-private tourism marketing partnership

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Abstract

Purpose – The importance of forging partnerships has become popular in tourism, and there is little empirical research investigating co-operative marketing associations, like Scotland's Malt Whisky Trail (MWT). With the management of the organisation undergoing change as a result of new directions within VisitScotland (the body with statutory responsibility for promoting tourism), this paper takes a timely examination of the options for future leadership and operation. The paper aims to examine the management issues that arise from the diffuse nature of the stakeholders' positions and explores the inherent problems in administering this type of co-operative marketing organisation.

Design/methodology/approach – Information for the paper was acquired through a series of in-depth, semi-structured interviews with representatives of each of the partners on the MWT. The work draws upon the theory surrounding public-private marketing partnerships, with the criteria for success in these being applied to the MWT.

Findings – This historically successful partnership required the varying stakeholder tensions to be reconciled and balanced among the distilleries which compete for market share, and between the priorities of public and private bodies. A number of leadership options are considered, in the recognition that the lead given to the MWT by its Chair will shape future direction. This future direction, of what is considered to be a mature partnership, polarises on either innovative developments at both member level and marketing of the MWT as a whole, or standstill.

Originality/value – This work gives an insight into successful long-term public-private marketing associations. The MWT is at a crossroads in terms of leadership and development options. These two issues are linked, with the Chair influencing whether an innovative route is chosen, or the status quo maintained.

Keywords Tourism, Spirits, Tourism management, Scotland

Paper type Research paper



1. Introduction

Scotland's Malt Whisky Trail (MWT) is a collaborative marketing venture between a number of whisky and whisky-related companies, along with the relevant government bodies associated with tourism development in the Moray area. The MWT brochure and web site provide promotional information on the eight distillery visitor centres and a cooperage, and include advertising inserts for local services. Along the 70-mile Trail itinerary, road signage provides travellers with directions to specific attractions (Figure 1).

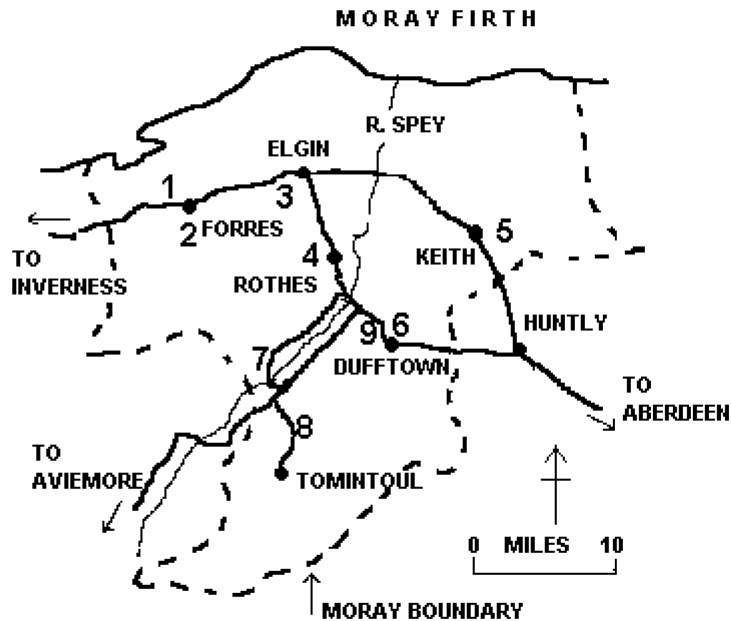


Figure 1.
Scotland's MWT

Management of the MWT is undertaken by a committee of partners comprising of representatives from:

- The working distilleries of Glenfiddich, Cardhu, Glenlivet, Glen Grant, Strathisla, Benromach, and Glen Moray;
- Speyside Cooperage;
- Moray Council, the local administrative body;
- Historic Scotland, the organisation which promotes the economic benefits and the public enjoyment of the historic environment, and which is responsible for Dallas Dhu museum distillery;
- Highlands and Islands Enterprise (HIE) Moray, which is the local enterprise company (LEC) for HIE in Moray. As a body of locally appointed representatives, it reflects the interests of local business and communities while meeting HIE's broad objectives of social and economic development in North and West Scotland; and
- VisitScotland Aberdeen and Grampian, a public sector organisation with the statutory responsibility for tourism marketing, which promotes the area as a tourism destination and until recently acted as Chair for the Trail Committee.

The MWT represents a remarkable example of organisational co-operation, not only between public and private sectors, but also between competitor whisky companies (Martin and Haugh, 1999). Recognition of the Trail's mutual benefits has underpinned more than 30 years of collaboration and created a unique marketing icon both for the region and for Scotch whisky as a whole.

2. Study objectives

As Selin and Chavez (1995) comment, the importance of forging partnerships has become popular in tourism circles, although very little empirical research has been conducted to explain this. The lifecycle of co-operative marketing associations has similarly been little researched (Barrett and Palmer, 1998). Scotland's MWT represents a case study of a co-operative marketing body, after 30 years in operation, that is, in a mature phase of its development and facing specific challenges. Recent changes in the operational approach of VisitScotland (discussed in section 4.1) imply that chairmanship of the MWT committee be passed from that public body to a different member. This change has brought about a search for a new operational format and triggered a re-evaluation of individual stakeholders' relationship to the Trail. The paper examines the management issues that arise from the diffuse nature of the stakeholders' positions and indicates the inherent problems in administering this type of co-operative marketing organisation.

2.1. Methodology

Information for the paper was acquired by a series of in-depth, semi-structured interviews with representatives of each of the partners on the Trail, with the exception of Moray Council. The selection of individual interviewees was straightforward; those who represented their organisations at the regular MWT meetings were contacted. This meant that they were fully informed about the actions of the MWT, and decision makers for the future operation of the MWT.

These interviews were conducted with the selected interviewees at their place of work. Bell (1992) makes the point that conducting such interviews has a downside in as much as it proves very time-consuming. While certainly this proved to be the case, especially when the travelling time is considered, this data collection method was thought appropriate for the collection of the qualitative data required.

The refusal on the part of Moray Council to participate certainly impacts on the work, as this partner is one of only three public sector members and one of the original driving forces in the creation of the partnership. Without a contribution from Moray Council, there is a gap in understanding from a historical perspective; however, with all the other partner contributions being given in full, the conclusions are still thought to be valid and worthwhile.

There is always the danger of bias creeping into interviews, largely on account of the fact there is a human interaction (Borg, 1981). To minimise the potential bias through the interaction between one interviewer and an interviewee, both the authors attended each interview. This meant the interaction was less dependent on one person's style, questions could be asked in turn, and responses recorded more easily.

3. Background

The MWT was initiated as a tourism venture in 1972 during a period when distilleries in Speyside were beginning to open visitor centres in response to public interest in whisky making. Under the auspices of the regional tourist association, a promotional brochure for the region's attractions made reference to the three distilleries of Glenfiddich, Glenfarclas, and Strathisla whose locations delimited what was referred to as "The Whisky Trail" (Martin and Haugh, 1999). Subsequently renamed the Malt Whisky Trail, its brochure promoted awareness of the three participating distilleries and their products, and at the same time fulfilled the tourism objectives of encouraging visitors to explore the countryside away from main tourist routes.

The opportunity to see whisky being produced offered the tourist an interesting and entertaining activity, especially on wet weather occasions. The visit incorporated a guided tour of the production and storage facilities, followed by a whisky tasting and shopping opportunities. Now many visitor centres include additional attractions such as audio-visual displays, tutored nosings, and other on-site features of interest (Martin and Haugh, 1999). The visit embodies a number of themes: the heritage of the distillery buildings and production process; the traditional hospitality of the Scottish welcome; the uniqueness and high quality of the whisky produced; and the mystique of the maturation process (McBoyle, 1994).

3.1. Visitor numbers

There is general agreement that the MWT has proved highly successful in raising awareness of the Moray region and its distillery attractions, both nationally and internationally. As a tourism marketing tool it is considered an icon in the industry. A study published by HIE in January 1999 indicates that 85 per cent of visitor respondents were aware of the MWT. Thirty-four per cent were already aware of the Trail leaflet, and 11 per cent claimed that the Trail was a major influence on their decision to visit the area (HIE, 1999, p. 53). In a May 2002-April 2003 report, HIE reported that 11 per cent of respondents again referred to whisky or the distilleries as a reason for their visit, more than twice as many as those indicating castles and ruins as their visit rationale, and almost four times as many as those citing scenery (HIE, 2003, p. 43).

Numbers alone may no longer define success, however. From the 1970s through to the early 1990s, visitor numbers were rising in most distillery centres across Scotland (McBoyle, 1994). In the later part of the 1990s, figures generally dropped. Recently numbers have shown a stabilising trend, factoring out the effect of foot-and-mouth disease on tourist numbers in 2001 (Table I). Many distilleries across Scotland, including some of those on the MWT, are seeking a form of market segmentation aimed at the high-end, independent traveller resulting in a higher spend per capita (which is the group targeted for leisure breaks in the area by VisitScotland). The MWT has been successful in increasing visitor numbers to the region over the years, but if numbers alone are not what some of the working distilleries seek, then the value of the MWT in meeting those companies' sales objectives may be called into question. On the other hand, the needs of other partners may depend heavily on visitor numbers increasing steadily.

	2000 ^a	2001 ^a	2002 ^b	2003 ^c	2004 ^d
Glenfiddich	83,481	69,360	80,512	76,192	78,068
Glenlivet	46,036	31,310	31,972	39,826	45,191
Glen Grant	22,864	15,943	16,006	21,407	21,634
Strathisla	14,324	12,574	14,088	9,945	9,836
Cardhu	NA	NA	9,500	8,000	8,000
Benromach	2,639	3,954	4,018	4,707	4,978
Glen Moray	1,710	2,044	3,099	3,141	4,101
Dallas Dhu	15,640	12,911	13,732	13,986	15,828
Speyside Cooperage	18,087	16,788	18,734	18,636	18,025

Notes: NA: Not available; ^aBaxter, 2002; ^bArshed *et al.*, 2003; ^cArshed *et al.*, 2004; ^dArshed *et al.*, 2005

Table I.
Visitor numbers on trail,
2000-2004

4. Public-private marketing partnerships

Ritchie and Ritchie (2002) suggest that tourism provides a unique set of circumstances from which businesses have incentive to co-operate to promote a destination. They acknowledge that other industries too have a track record of collaboration: rival high tech firms working together to encourage widespread adoption of technology, non-profit organisations banding together to encourage charitable giving, and booksellers, libraries, and print media uniting to promote reading.

Case studies in the USA show that public-private marketing partnerships work well, and are effective when the two sectors unite and this union is managed by a non-profit organisation (Kraynak, 2005; Crain, 2005), which is exactly how the MWT has been operating.

As Augustyn and Knowles (2000) observe, there are critical success factors for tourism partnerships, among these being: a long-term agreement, formal links that have been established with care, and finally effective and efficient actions on the part of the partnership. While partnerships are perceived as a way to stimulate investment, create wealth and jobs, some cynics feel that the private sector is simply trying to get its hands on public funds, and from the other side, there is suspicion that the public bodies simply want to supplement declining revenue by taking more from the private sector. These common beliefs can lead to a question of the effectiveness and efficiency of tourism partnerships (Augustyn and Knowles, 2000).

At the Scottish national level, the focus of this case study, this is not currently the case – public sector commitment of funds for tourism has been increasing in the recent past.

In the MWT, the mutual benefits of business promotion and tourism enhancement have been proven effective by the enduring success of the venture which has grown to include eight private sector operations. Each establishment on the Trail gains according to its specific needs. The distilleries achieve heightened public awareness of their products and brand affiliation through direct customer contact, and through these efforts enhance the firm's image in the eyes of customers and public and, as a result, influence the way in which these groups relate to the firm (Vecchio, 2000, p. 338). At the same time, the tourist gains a series of high quality experiences at low or no cost. The Moray region profits economically in terms of employment opportunities in the visitor centres, and more particularly in increased revenues in local retail and accommodation sectors. Tourism promotion bodies have a uniquely Scottish product to advertise; recent surveys showed that 11 per cent of respondents claimed that seeing distilleries was their major reason for visiting the area (HIE, 1999, p. 53; HIE, 2003, p. 43). Thus, for an outlay of £3,500 per partner (2005) to support web site and brochure costs, wide national and international exposure of the Moray region and its whiskies is achieved. (Signage costs are paid initially by each visitor centre.)

By association the iconic images present a marketing unique selling point for Scotland and the UK in national and international destination promotion.

4.1. VisitScotland re-organisation in 2005

With the Scottish executive as the driver, a major re-organisation in terms of public sector support for Scottish tourism marketing and development has taken place. As of 1 April 2005, the role, funding and operations of VisitScotland, the national body with statutory responsibility for marketing Scotland were radically changed. This has influenced the organisation of any future public-private partnerships. The re-organisation signalled the move towards a private sector driven tourism promotion

and development, away from the previous largely public sector led initiatives. The Challenge Fund is an excellent example of this thinking. Under Challenge, business groups or associations can apply to VisitScotland for up to 50 per cent of a total cost of any new industry led initiative. VisitScotland can now be seen as partner and facilitator rather than leader. (This prompted the requirement on VisitScotland, at a regional level, to relinquish the Chair on the MWT.)

4.2. Polarities

Creating a commitment to co-operate from among the different partners is not easily achieved. Polarities of interests have to be reconciled and balanced both among the distilleries which compete for market share, and between the priorities of private and public bodies. The Cooperage, for example, seeks to maximise visitor numbers in order to meet cash flow needs. Because of their broader tourism and economic development mandate, the public bodies seek to increase the volume and the economic value of visitors to the region. For them, visitor numbers matter also. In contrast Historic Scotland's purpose for Dallas Dhu museum distillery is somewhat different – to increase the public's appreciation and enjoyment of historic environments. Continually increasing visitor numbers at Dallas Dhu heritage centre does not necessarily satisfy the museum's goals in which experience quality is a priority. The objectives of the working distilleries differ yet again. For them, brand exposure to increase on-site and down-line whisky sales is the target, and so high-end customers, not simply visitor numbers alone, may be the top priority (Miller, 1994). Furthermore, they may not appreciate the public bodies' interest in utilising the Trail to promote additional attractions in Moray, perceiving that as additional competition with their visitor attraction.

Further polarities can arise since all representatives on the Trail must account for their decisions to higher levels of authority within their respective organisations. Since individual distilleries answer to their parent company, representatives must ensure compatibility between Trail activities and company-wide goals and policies. For their part, VisitScotland and HIE Moray, as public sector bodies, must tailor their role to meet the current direction of government policy which reflects national and regional realities, not just local preferences. That these polarities have been reconciled for 30 years is testimony to the determination and willingness of its different membership to compromise. Mutuality of gains is and remains the energising force behind such co-operation.

5. Management issues for the public-private marketing partnership

According to Dredge (2006), managing local tourism partnerships is dependent on resolving the following five issues:

- (1) leadership;
- (2) the need for a wide community involvement;
- (3) resourcing of tourism and achieving self-supporting status;
- (4) roles and responsibilities of partners need to be clear;
- (5) rules of conduct are transparent and agreed, allowing all participants a voice.

Management of the MWT has always involved finding a level of consensus between competing interests. This has been achieved despite several switches in company

ownership, variations in participating distilleries, and several changes in personnel. Entering the 21st century, the MWT partners find themselves facing a number of issues, which will be related in turn to three of the Dredge (2006) issues.

5.1. Leadership of the MWT

Leadership has been synonymous with the role of Chair, and almost from the beginning the MWT has been chaired by a member of the regional tourism association. There is wide agreement that this organisation, now VisitScotland Aberdeen and Grampian, has provided an excellent service in terms of coordinating the many different goals, acting as catalyst for new ventures, and, by virtue of its arm's length position, providing an objective perspective, and independent leadership. Partners are wholeheartedly behind continuance of this role by VisitScotland Aberdeen and Grampian; however, changing policy directions within VisitScotland dictate that its personnel provide facilitative support rather than a leadership function. Chairmanship of the MWT must now pass to other members. Industry representatives are reluctant to invest company time in a venture that comprises a large tourism component which is outside their purview. At the same time, individual companies feel hesitant about leadership vested in a competitor firm. However, when the issue of chairmanship becomes resolved, the internal dynamic of the group is likely to be altered.

5.2. Wider community involvement

The MWT was established by a small and exclusive group of distilleries to promote their products. Tourism benefits flowed from the unique concept. Member distilleries still view the MWT as a distinctly whisky-related experience. Local and regional government bodies and tourism associations tend to view the Trail as an opportunity to develop more of a mass market, including promotion of additional non-whisky related attractions. Developing a future strategy for the MWT has to overcome these two polarities. Although various local services are included as advertisers in the Trail brochure, no non-whisky related activity has been admitted as a partner because of distillery and cooperage determination to retain whisky as the sole focus of the venture. Even allowing for a solely whisky focus, the question arises as to whether the MWT's boundaries might be expanded to include additional distilleries. Moray Council, however, would reject the idea of expansion beyond the Moray region.

5.3. Resourcing and self-supporting status

Most members currently agree that the marketing exposure from the MWT is well worth the cost of partnership. Gaining additional exposure or incorporating new developments within the MWT would likely incur additional costs. Private sector partners must justify these costs at parent company level where alternative ventures may compete for the same marketing funds. There exists therefore a strong pull towards retention of the status quo. This hesitance can prove an irritant to those companies which are well funded and eager to activate new marketing strategies, as well as government bodies whose mandate requires them to enhance tourism and business capacity in the area. Ultimately, without the resources to support future marketing aspirations the partnership will break down.

6. Stakeholder needs

The MWT encompasses a diffuse collection of interests based on narrowly defined, industry self-interest on the one hand, and a much broader public interest derived from

tourism and employment benefits on the other. Decisions regarding the operation of the MWT can fracture along different lines: among competitor distilleries; between private sector needs and public sector goals; and between local and wider interests.

Stakeholders who at any time feel dissatisfied with the way the Trail is operating have three options (Hirschman, 1970):

- (1) To stay and contribute (exercise loyalty). In the main this has been the option chosen by stakeholders on the Trail to date.
- (2) To exit. This option has been exercised in the past by Glenfarclas Distillery. This option would be chosen if the stakeholder felt unable to influence the Trail activity, and/or could identify better options elsewhere.
- (3) To stay and try to change the situation, exercising voice, a requirement highlighted earlier as an issue by Dredge (2006).

At the time of the study, the annual fee allied to stakeholder aspirations for increased marketing activity had potential to push members to consider Hirschman's options 2 and 3.

Specifically, while some stakeholders thought £3,500 per annum was fair, and perhaps inadequate to undertake significant marketing campaigns, others felt that no more than £3,500 could be justified.

Achieving consensus on management matters revolves around the issue of stakeholder satisfaction. Below is an assessment of the basic needs of the different stakeholder groups.

6.1. Long-term partners

Glenfiddich and Strathisla Distilleries are founding members of the Trail. Glenfiddich Distillery, owned and operated by the family of William Grant and Sons Ltd, receives the highest number of visitors – 78,000 in 2004 (Arshed *et al.*, 2005). Strathisla, Glen Grant and Glenlivet, all part of the Chivas subsidiary of Pernod Ricard S.A., account between them for a total of just under 77,000 visitors in 2004 (Arshed *et al.*, 2005). Both Glenfiddich and Chivas are highly committed to the Trail, and see their presence on it not just as achieving brand marketing exposure, but claim also a sense of social responsibility to promote tourism for the benefit of the wider community. Backed by the resources of both companies, these distilleries for the most part would welcome innovation on the Trail.

Cardhu Distillery is another long-term member. Owned by United Distillers and Vintners Ltd, the whisky arm of Diageo, its attitude to the Trail differs from those above. Arshed *et al.* (2005) report that visitor numbers for 2004 were 8,000 at Cardhu, comparable to those of Strathisla (10,000), but considerably less than those of Glenfiddich (78,000) and Glenlivet (45,000). The low visitor numbers at Cardhu, along with what the company feels is an insufficient spend per head, calls into question the financial return of its membership on the Trail. Commitment to the partnership is therefore weaker, resulting in a reluctance to enter into costly innovations.

6.2. Recent distillery members

Benromach Distillery joined the Trail in 2000, and Glen Moray followed in late 2004. Benromach is the only distillery of Gordon and MacPhail; Glen Moray is the only distillery of Moët Hennessey Louis Vuitton S.A. (MHLV) in the Moray region. Both distilleries gain clear benefits from partnership in terms of the credibility that flows to

them from their association with the major brand distilleries on the Trail. Both are therefore highly committed to the continuance of the Trail but would find major innovations at this stage a financial burden.

6.3. *Speyside Cooperage*

Over the last five years visitor numbers at the Speyside Cooperage have varied little from around 18,000 (Baxter, 2002; Arshed *et al.*, 2003, 2004, 2005). As a private company solely in the business of providing casks to the whisky industry, the Cooperage has no interest in brand awareness, whereas cash flow is of paramount importance and thus entrance fees from visitor numbers are critical to its operation. Yet the Cooperage must compete with those other attractions on the MWT that are free (i.e. Glenfiddich, Glenlivet, and Glen Grant Distilleries). Static visitor numbers may be interpreted as showing ineffectiveness in the Trail's promotional material as far as meeting the Cooperage's business expectations. The Cooperage stated it would be hesitant in considering any innovation that has increased financial implications.

6.4. *Advertisers*

Although not partners of the MWT, a group of regional companies in accommodation and hospitality, whisky-related sales and events, and Scottish woollen garments all advertise in the brochure. Their business provides financial support for the brochure. At the same time, the companies gain promotional access to overseas tourists and national visitors. They have, therefore, a stake in the MWT's success, but have no influence in its decision-making process.

6.5. *Historic Scotland*

Dallas Dhu distillery had been inactive for many years before being acquired by Historic Scotland as an example of Scottish industrial heritage. The museum distillery is only one of 345 properties for which Historic Scotland is responsible. Though the distillery's visitor numbers have tended to be steady at around 16,000 (Baxter, 2002; Arshed *et al.*, 2003, 2004, 2005), comparable to those of the Cooperage, the high spend per visitor in Dallas Dhu's shop provides a satisfactory return on investment for Historic Scotland. The benefits of Dallas Dhu's international exposure through the Trail are not questioned, but new developments that require financial backing would not be well received given the high number of attractions competing for Historic Scotland's marketing funds. For Dallas Dhu, the status quo would appear to satisfy Historic Scotland's needs and to provide a level of social commitment to the region in terms of its employment opportunities.

6.6. *Moray Council*

The Moray region has gained tremendously in economic terms during the Trail's long history and jealously guards its right to the national and international exposure of its whisky profile. In a 1997 study, about three out of every five visitors to Moray saw a clear association between whisky and Moray (HIE, 1999, p. 51). Moray Council aspirations for regional promotion are clearly fulfilled by the Trail brochure. Enhancements to the Trail's attractions would likely be supported as long as the venture remained within Moray boundaries.

6.7 HIE Moray

Inasmuch as the Trail supports the mandate and role of HIE Moray, the government body has a strong commitment to ensure the Trail's continuance and is poised to provide seed money for potential new initiatives. Strong support would be given for innovations that would underpin any employment opportunities deriving from a tourism base widened to include additional attractions such as major hotels, retail outlets, and historic sites. Nonetheless HIE Moray is cognizant of the different priorities and needs of the private sector partners, and recognises that any tourism initiative will be constrained within the context of the necessary public-private consensus of interests.

6.8. VisitScotland Aberdeen and Grampian

The regional office of VisitScotland is strongly supportive of the MWT as a unique icon of Scottish tourism, but, like HIE Moray, would welcome an expanded format for the venture to include other high quality attractions besides whisky-related activities. Recognising the business sector's intent on retaining the spotlight on whisky, the government body has instead suggested as feasible improvements the participation of additional distilleries, and new dual-focus activities linking e.g. whisky and golf. In releasing its role as Chair of the Trail Committee, VisitScotland Aberdeen and Grampian claims to be seeking fresh leadership from among the other partners.

Clearly, the MWT comprises a group of partners with differing goals and aspirations. Table II summarises the stakeholders' positions on the major issues currently facing the group. There is a clear split between private and public partners regarding the pre-eminence of whisky as the Trail's focus. Simply increasing visitor numbers is being superseded by an interest in targeting high-yield customers to satisfy several industry members' needs. (Both Cardhu Distillery and VisitScotland Aberdeen and Grampian express an interest in both numbers and spend per head.) The split of

	Specific vs mass market		Numbers vs exclusivity		Status quo vs change		Moray vs wider area	
	Whisky Only	Additional attractions	Increasing numbers	High yield	Status quo	Change	Moray area	Wider region
1	X			X		X	X	
2	X (3) ^a			X (3)		X (3)		X (3)
3	X		X	X	X			X
4	X			X	X			X
5	X			X	X			X
6	X		X		X		X	
7	X			X	X			X
8		X	X			X	X	
9		X	X			X		X
10		X	X	X		X		X

Notes: 1: Glenfiddich; 2: Chivas representing three distilleries – Glenlivet, Glen Grant, and Strathisla; 3: Cardhu; 4: Benromach; 5: Glen Moray; 6: Speyside Cooperage; 7: Historic Scotland; 8: Moray Council; 9: HIE Moray; 10: VisitScotland Aberdeen and Grampian

^aAt the moment Chivas holds three votes (rarely used) for its three distilleries; however, this will be reduced to two on the sale of Glen Grant required on the acquisition of Allied Domecq by Pernod Ricard

Table II.
Stakeholders' positions
re-management issues

opinion regarding the issue of innovation to the Trail cuts across the public-private divide with the larger whisky companies' interest in new initiatives. Overall, opinion favours expansion of the Trail beyond Moray.

7. Leadership options

Barrett and Palmer (1998) point out that the number of different agendas of individual members in co-operative marketing ventures like the Trail makes it extremely difficult to achieve a shared goal, and that a potentially volatile situation can arise because of competing interests. They suggest that effective management depends heavily on the leader's ability to coordinate, integrate, motivate, and act as referee. The enduring success of the Trail over the past 30 or so years attests to the leadership quality that has guided the organisation thus far. The search for a new chairman has therefore major ramifications. A number of options present themselves:

- Choosing a leader from among the working distilleries is fraught with difficulties. On the one hand, the major whisky companies may be seen as being too powerful, with their own agenda to champion, and with resources which other participants cannot match. On the other hand, the junior members in terms of membership duration or company size may be perceived as lacking credibility and experience in the joint marketing venture. Several distilleries voiced their apprehension of a distillery Chair for these reasons.
- Hiring an individual to act as Chair is an option favoured by some members. An external person is assumed to have a degree of objectivity, acting at arm's length from the other members' specific responsibilities. But as an employee of the group, the person would hold no authority to influence decision-making other than by the weight of their own experience and personality. In effect, the person may be no more than a hired consultant, providing ideas but without the structural authority to advance them. Further, the person's personal preferences and allegiances would, in all likelihood, neutralise their impartiality over time. A hired Chair also represents an additional cost.
- With VisitScotland Aberdeen and Grampian required to pass the role of Chair to another partner, three public bodies are possible recipients: Moray Council, Historic Scotland, and HIE Moray. Moray Council has adopted a hands off approach to the Trail management. Historic Scotland's participation on the Trail is ancillary to its primary responsibility to promote 300-plus historic sites besides Dallas Dhu museum distillery. The task of Trail Chair would not be sought by its representative. In the absence of VisitScotland Aberdeen and Grampian, HIE Moray is perhaps the most logical public body to act as Chair. Its mandate in terms of promoting economic development, industry growth, and job creation gives it an appreciation of both business necessities and regional tourism goals. Devising a collaborative format for the future of the MWT may be more easily achieved under HIE's guidance than most other members.
- While a public sector Chair is attractive (Kraynak, 2005; Crain, 2005), the chosen person and organisation must be able to view the MWT as a (perhaps growing) geographic region which is understood by its visitors as a unique entity (Buhalis, 2000) and possess the ability to work across any geographical or political boundaries not seen by tourists.

8. Conclusion

Buhalis (2000) makes the point that partnership marketing enables destinations to develop long-term relationships with consumers and benefit both destinations and suppliers, and certainly this has seen to be the case for the MWT since its creation in 1972.

As the MWT can be considered a mature partnership as defined by Buhalis and Cooper (1998), this case study agrees with their findings that co-operative local partnerships between public and private sectors allows resources to be pooled to develop and implement comprehensive marketing for the greater good of the region.

Whichever source the new Chair is drawn from, there can be no doubt that the future of the MWT will depend heavily on sound leadership (Dredge, 2006). Given the partnership format of the MWT Committee and the diffuse nature of the organisation's goals, a top-down leadership style would be inappropriate. Instead it will require the skill to devise a path to which all partners can aspire, and the ability to motivate members to achieve it. To be successful in the future, each partner must continue to gain from it in a way that meets their specific needs or presents an acceptable compromise. Further, the Trail must continue to provide a quality tourism product worthy of national and international promotion, and capable of retaining or increasing sufficient numbers of high-yield visitors in the face of: alternative tourism attractions that may be developed elsewhere, down turns in the economy, and any other external challenge. In the latter regard innovation becomes an important part of the strategy to hold the public's attention.

Innovation can occur at two levels: (a) within each individual member's visitor attraction; and (b) in the operation and marketing of the MWT itself. New developments have been introduced into some of the individual attractions. Glenfiddich Distillery, for example, added the option of a Connoisseur tour in which the visitor spends up to two hours on-site while receiving an in-depth tour of the distillery and the opportunity to sample several types of Glenfiddich whiskies. Within individual enterprises there is greater freedom of decision-making to introduce innovation. Additional new functions or special events at other distilleries would help to differentiate the visitor experience and provide a more varied choice of activities.

At the level of the MWT itself, reaching consensus on new developments is more complicated. In considering strategic innovation there is a requirement to question the status quo (Markides, 2000). While the vacuum in leadership identified at the time of this study presents the opportunity for stakeholders to innovate following re-appraisal of activity and asking the difficult questions as to what comes next, the research seems to suggest this is unlikely to happen. Certainly since the work by Martin and Haugh (1999) no major changes have taken place. Most interviewees reported that the Trail just jogs along, and without the stimulation of an increase in the annual fee there is no requirement to evaluate costs and benefits. Of course, with, in effect, the main Trail activities of brochure copy and production and meeting administration being carried out by VisitScotland Aberdeen and Grampian there was little demand being placed on other members.

With a dynamic chair there is the opportunity to use the MWT to provide impartial advocacy for the industry as a whole. Other industries have carried out effective lobbying from a trade association point of view (Vecchio, 2000, p. 388). Both whisky and tourism are affected by legalisation and control, using the MWT to speak with one voice could influence future national government policy.

As tourist attractions in the 21st century raise their game, there is a real need for the MWT to be the one must do whisky trail in Scotland. To achieve this the Trail has to differentiate itself from others and innovate.

While reaching agreement on future activity is difficult, the actual process is made easier by the provision of government funds. HIE Moray has in the past provided financial support to the Trail. Should there be new projects or initiatives that increase economic activity in the region more funds would be made available. Utilising financial opportunities such as the Challenge Fund will depend on the ability of the partners to collaborate, compromise, and dedicate time and money to the project. The continued vibrancy of Scotland's MWT depends on the partners' commitment to its concept of mutual gain through co-operation, and to the capabilities of its future leadership. It is to be hoped that neither will falter for the loss of such an acclaimed icon of Scottish tourism and of distillery collaboration would greatly diminish the visitor's enjoyment of the Moray area.

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