Destination image and its effects on marketing and branding a tourist destination

A case study about the Austrian National Tourist Office - with a focus on the market Sweden

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STATUTORY DECLARATION

“I declare in lieu of an oath that I have written this Master thesis myself and that I have not used any sources or resources other than stated for its preparation. I further declare that I have clearly indicated all direct and indirect quotations. This Master thesis has not been submitted elsewhere for examination purposes.”

Date: June 8th 2011
Signature

Katharina [Signature]
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LIST OF ABBREVIATIONS

ANTO        Austrian National Tourist Office
CEE          Central and Eastern Europe
CSF          Critical Success Factor
DMO          Destination Marketing/ Management Organisation
GMPI         Global Market Performance Index
IMM          International Market Management
NTO          National Tourist Organisation
ÖW           Österreich Werbung
PCI          Product Country Image
PR           Public Relations
TDI          Tourist Destination Image
T-MONA       Tourismus Monitor Austria
UNWTO        United Nations World Tourism Organisation
WOM          Word of Mouth
ABSTRACT

In a tourism context, the image potential customers have of a destination is a very important issue. Images play an essential role in destination choice matters and in this regard, as tourism services are intangible, images are said to become even more important than reality.

The concepts of destination image and destination marketing and branding are closely interrelated. The ultimate goal of any destination is to influence possible tourists’ travel-related decision making and choice through marketing activities. Although it is not possible to influence all aspects of image formation, tourism marketers try to strategically establish, reinforce and, if necessary, change the image of their destination by communicating a strong destination brand. Hence, image studies are considered to be a vital part of marketing and branding strategies. However, not everyone has the same image of a destination, as image perception changes according to different influences, such as personal, cultural and psychological ones.

The purpose of this thesis was primarily to give an overview of destination image theory and its interrelationships to destination marketing and branding. In this respect, the study aimed at finding out in how far a DMO can achieve to develop a marketing strategy that is consistent and somewhat standardised, and yet adapted to the individual market and culture in which it is operated. Furthermore, the study wanted to investigate whether marketing approaches should be changed for people with different images of a country as a destination, or if alternatively a “one-size-fits-all” approach should be employed.

In addition to a literature review, a case study made it possible to show how a real organisation handles those questions. The case of the Austrian National Tourist Office ANTO provides a good example of an internationally operating destination marketing organisation that uses market research, and among others also image studies, to adapt its marketing mix and branding approach to the individual markets’ characteristics and the image held of the destination Austria. By means of applying the qualitative method of personal in-depth interviews and thorough analysis, interesting data concerning the topic of destination image and marketing could be collected and compared to the findings from literature.

Results indicate that destination image studies are the foundation of successful marketing strategies and that in times of ever-increasing competitiveness, image is one of the few points of differentiation from other tourist destinations. It is necessary to be aware of the fact that customers’ cultural differences have an influence on how different they perceive images. Therefore, DMOs should have a powerful overall strategy which globally leads into one pre-defined direction, but then locally adapt this common strategy to regionally differing cultural specifics. Even though destination brands should be strong and consistent, it is not advisable to communicate the exact same image to all customers.
PART A

BACKGROUND
1 BACKGROUND

1.1 Problem statement

“As tourism services are intangible, images become more important than reality” (Govers & Go, 2007). This quote perhaps constitutes the most predicative statement building the underlying problem of this thesis. It describes today’s situation in the tourism industry to the point, where events and trends are becoming ever more complex and fast-paced. As tourism destination products and services cannot be tested prior to the purchase, consumers have to build images of them and make their purchase decision based on these images. Whether the image is an accurate portrayal of what the respective destination is really like is thereby not so important, what really matters is the mere existence of the image in the minds of potential consumers (Mayo, 1975, p. 15).

Images play an essential role in destination choice matters, and the ultimate goal of any destination is to influence possible tourists’ travel-related decision making and choice through marketing activities. Although not all elements contributing to the development of an image can be controlled, tourism marketers want to strategically establish, reinforce and, if necessary, change the image of their destination (Chi & Qu, 2008, p. 634).

Through advertising, image can become an artificially created differentiation, because it strongly influences and forms beliefs about the offered tourism products (MacKay & Fesenmaier, 1997, p. 540). Moreover, destination image contributes to forming a destination brand and also to its success. The starting point for developing and keeping a strong brand image is the fundamental understanding of the tourists’ images of the destination and image studies are a prerequisite to an overall successful marketing strategy. Hence, it is clear that image is strongly related to tourism marketing issues and plays an incredibly important role for the touristic success of a destination (Tasci and Gartner, 2007, p. 413).

Even though there is consensus about the fact that constant destination image monitoring is crucial for a successful market positioning, some destination management and marketing offices (DMOs) are not yet fully aware of the importance images play for them. They have to become aware of the high significance of strategic image management, which can among others be achieved through tactical branding activities.

1.2 Research questions and aim

The proposed underlying research questions to be treated within the scope of this Master thesis are three-fold:

- How are the concepts of destination image and destination marketing and branding interrelated?
- In how far can a DMO, across different markets and cultures, achieve to develop a marketing strategy that is consistent and somewhat standardised, and yet adapted to the individual market?
- Should marketing approaches be changed for people with different images of a country as a destination, or alternatively, should a “one-size-fits-all” approach be employed in which the same image is communicated to all potential visitors?
Taking these research questions as a lead, the aim of this thesis can on the one hand be summarised as to provide a deep understanding of the relation between tourist destination image and destination marketing efforts. In this regard, the author strives to give an extensive review of image and marketing related literature. On the other hand, another objective of the paper is, in addition to the knowledge gained from literature, to use a case study methodology to provide valuable insight for both academics and practitioners into the process of marketing and branding a destination. The author of this thesis chose the case of the Austrian National Tourist Office (ANTO) to identify an internationally operating DMO’s practical marketing approaches.

This research is made under the assumption that a better understanding of the importance of image can bring insights with regards to more effective and efficient ways of marketing for DMOs. In addition to findings from the literature review, the ANTO case should depict approaches and experiences applied in practice and eventually contribute to finding answers to the underlying questions.

Although it gives an overview of destination image and takes the ANTO as an example, this paper does not attempt to make an image assessment of Austria as a destination by measuring in any quantitative or qualitative way the tourist destination image of Austria among consumers.

1.3 Research method

In order to obtain viable results and provide new valuable information to the academic sphere concerning the interrelationships between destination image theory and destination marketing, the author selected literature review and in-depth expert interviews as research methods for the compilation of this paper. Both these approaches belong to the discipline of qualitative research methods, which stands in contrast to quantitative techniques. In qualitative research, the collected information is not based on numbers and consequential statistical analysis and conclusions, as it is the case with quantitative methods (Veal, 2006, pp. 98-98).

1.3.1 Literature review

For this thesis primary as well as secondary data and material are used. First, a review of appropriate literature provides insight into the respective research fields, which should serve as a basis for theoretic knowledge about the paper’s topic. By reviewing and critically analysing secondary literature, the researcher’s overall understanding of the topic was deepened. Reading diverse articles, books and studies provided information on the current state of knowledge in the respective domains and the whole context, including theoretical concepts, main concerns and ideas, but also gaps in knowledge became apparent. The gained knowledge was, if suitable, integrated into the thesis and contributed considerably to the formulation of effective, precise and manageable research questions (Finn, Elliott-White & Walton, 2000, pp. 234-235). The literature provides perceptions on the potential challenges of the thesis’ issue, which can be used for drawing comparisons to the practical qualitatively approached example of the tourist destination Austria. Thus, an interplay between theoretical considerations and practical investigations is created.
1.3.2 Case study

Secondly, in order to best contribute to the body of human knowledge, a case study was conducted by collecting primary data. Case studies are a very suitable research method offering comprehensiveness and profundity for understanding a particular phenomenon. Through the examination of a specific instance, a general problem can thereby become illuminated (Budeanu, 2007, p. 50 cited following Beeton, 2005, n.p.a.). Additionally, case studies demonstrate a high degree of flexibility and are used extensively in tourism research (Hudson and Ritchie, 2009, p. 222). In order to gain insight into a DMO’s practical approaches to marketing and branding in conjunction with imagery studies, the case of the Austrian National Tourist Office was chosen to be analysed.

To obtain the appropriate information, the conduction of expert interviews was identified as a crucial element of the research process. The aim behind the author’s decision to conduct expert interviews was to gain primary data, to fill the gap in knowledge and to better comprehend a DMO’s practical approach in handling marketing issues. So, in addition to conducting a thorough review of the relevant literature, the author also conducted a series of face-to-face interviews with appropriate stakeholders, based on the beforehand gathered theoretic information. In that way, the author wanted to identify and explore the issues and strategic challenges facing those who market destinations in the future generally, and specifically Austria. According to Dunn (2005, p. 80) interviews are an excellent method of gaining access to information and collecting a diversity of opinions and experiences. The following suggestions and recommendations outlined by Dunn (2005, pp. 79-105) were taken into consideration and provided a valuable basis for the conduction of the interviews:

1. Select participants:

In total, four informants, who were chosen purposefully on the basis of their considerable knowledge about destination marketing, participated as experts in this study. In detail, Ms. Teresa Lastuvka, Ms. Marion Michenthaler, Mr. Michael Scheuch and Mr. Michael Tauschmann, who all work for different departments of the ANTO in Vienna and Stockholm, were approached. One person provided useful material about several relevant ANTO market research findings, the other three agreed to give an appointment for a face-to-face interview, or to answer the questionnaire by e-mail, respectively. The researcher had the possibility to gain an insight into the topic of destination branding by sending questions to Mr. Michael Scheuch, who is employed as division manager for brand management in the ANTO in Vienna. Furthermore, Ms. Marion Michenthaler, ANTO responsible for market studies, could also be gained as interview partner for this Master thesis. Finally, a personal meeting with Mr. Michael Tauschmann, the manager for the Swedish market, working in the ANTO office situated in Stockholm, could be arranged and allowed for deeper insights into the marketing activities in the Swedish market. All three interviews were conducted in the author’s and respondents’ mother tongue German for reasons of better fluency. Transcriptions of the original German versions of the interviews, as well as translated English versions can be found in the attached appendix of this paper.
2. Construct the survey:

The instruments utilised for the expert interviews were questionnaires, consisting of between 10 and 20 questions, each individually adapted to the field of expertise of the respective interview partners. The research topics covered in the questionnaires were the result of thorough literature review and considerations about how the gained theoretical knowledge could be combined with practical approaches.

3. Collect the data:

The one interview that was conducted personally was semi-structured, which means that the questionnaire was mainly employed as an interview guideline and although the whole content of the questionnaire was covered, flexibility during the interview was ensured. The interview took place on April 26, 2011. It was audio taped, which, referring to Dunn (2005, p. 95), allows for a natural conversational interview. As the other two questionnaires were answered by e-mail, there was no possibility for the author to dig deeper by asking further questions, however, the respondents provided very comprehensible answers and there was no lack of clarity.

4. Analyse the data:

After the collection of all opinions and the interview transcription, the results and findings were compared to the underlying theoretical knowledge as well as to each other. The analysis of the findings is integrated as basis for critical observation in the chapter about the ANTO case as well as in the paper’s conclusion.

1.3.3 Advantages and disadvantages of the chosen methods

The benefits of literature review have already shortly been outlined above and include deepening the researcher’s knowledge of the topic at hand as well as serving as a basis for the development of a suitable research protocol. Additionally, a thorough literature review can facilitate to place the study in the context of existing research. However, one major concern the researcher should be cautious about, is the risk of confirmation error. In other words, when it comes to interpreting the own case study findings in light of other existing models from the literature, one should be aware of and open for the possibility that the findings contradict each other (Smith, 2010, pp. 193-194).

Regarding the virtue of expert interviews, it can be found that even though qualitative research is often criticised to lack credibility and rigour (Decrop, 1999, p. 158), it undoubtedly has some benefits. First of all, Walle (1997, p. 535) argues that due to the fact that qualitative research is free to ask questions, it may be possible to examine reality in all its complexity, which may not be the case with quantitative research. Consequently, it may provide a deeper understanding of the research area. However, Dunn (2005, p. 83) is aware of the disadvantages and reminds that carrying out expert interviews may be very time-consuming, as the formulation of the questions and the definition of the specific topics to be covered within the interview have to be carefully planned and prepared. Another potential negative aspect is that human beings are very complex and thus, the researcher might have difficulties to correctly interpret the behaviour of the interviewees (Jamal and Hollinshead, 2001, p. 71).
Generally, case studies use a wide variety of different sources. The data sources for this thesis consisted of the already mentioned personal interviews with key informants, but also of in-house documents, company-specific studies carried out by and received from the ANTO and the organisational website. Smith (2010, p. 194) points out that all the sources used for case studies need to be used with sensitivity and caution, and that it is good to have a certain degree of scepticism, as documents might not necessarily be accurate or could be incomplete. Similarly, the content of websites might be highly biased or even inaccurate, because it only shows how the organisation wishes to be portrayed. Also, as already mentioned above, misinterpretations of interviews and the other sources are very likely.

The main limitation of case studies is normally the fact that even though they can only describe insights gained from one specific studied case, there is temptation for generalising these results. Like most case study researchers, the author of this thesis is aware that it is not possible to generalise the findings from the ANTO case to a broader conceptual set of principles, such as other DMOs. Still, there is often a desire to present some general principles which allow the underlying case study findings to have broader implications. This is definitely possible, as good case study research can without doubt teach important lessons (Smith, 2010, p. 197).

1.3.4 Validity and reliability

The above mentioned limitations lead to the issue of the concepts of validity and reliability, which are the key challenges of research and should be addressed at this point. Validity, on the one hand, is about whether the applied instruments actually measure what is intended to be measured (Clark et al., 1998, p. 129). There are three forms of validity, namely construct, internal and external validity. Construct validity indicates whether the author’s judgement and evidence are sound and allow him or her to obtain valid conclusions. Internal validity is about whether the conclusions made about causes and effects are reasonable and make sense, hence if they are functionally related. External validity, moreover, implies whether the findings lead to deeper insights or support other concepts and models related to the topic of the study.

These concepts, which are commonly used to judge the quality of any empirical social research, are also vital for this thesis. Especially during the empirical data collection, the author of this thesis aimed at assuring high validity. Increased validity was thereby assured by avoiding subjective data collection. Instead, multiple information sources, ranging from personal interviews to website and other published data were used for the compilation of the relevant chapters.

Reliability, on the other hand, is the degree to which the researcher, or any other person, would come to the same results if the exact same study was to be carried out again (Smith, 2010, pp. 197-198). The author’s aim was to conduct a reliable study, however, it is not possible to determine its true reliability unless the same investigations would be carried out again under the same conditions and with the same subjects.
1.4 Outline of the dissertation

The paper is divided into three main parts, namely:

PART A: Background
PART B: Theoretical framework
PART C: Empirical findings

Part A covers the background of the thesis and deals with the basic introduction to the topic, including this chapter outline. The research problem underlying the thesis is described and should give the reader an idea about the general context of the chosen topic. The research aim declares why the topic is important and what this paper can contribute to fill a knowledge gap in this field. Accordingly, the research questions, which build the basis of the research, are addressed. Another important part of the introduction is the justification of the research method, explaining the reasons for the choice of methodology as well as mentioning the respective advantages and disadvantages.

Part B provides the theoretical framework of the paper. Chapter two begins by giving an overview of destination image research. A definition of destination image is given, followed by an explanation of the different forms and dimensions of destination image. In addition, this chapter serves the purpose of examining destination image formation, outlining various image formation agents. Furthermore, different techniques of destination image measurement are described. Sub-chapters on country-and culture related influences on destination image, images’ effects on destination choice and consumer behaviour, as well as on the functional relationships of destination image and strategic image management conclude the first theory chapter.

Chapter three continues the literature review, focusing on destination marketing. It begins by providing a definition of the term destination marketing, followed by a summary of critical success factors. Next, the challenges faced by destination marketers are addressed and a corresponding framework is introduced. For the purpose of this paper the emphasis is put on destination branding, giving details about meaning, advantages and challenges of this particular marketing approach. The following section assesses the interrelationship of destination image and marketing. After a short outline of the DMO’s role in conveying image to consumers, the section continues with the relation between image and branding. Various theories are introduced, illustrated by corresponding graphs. The chapter concludes with the reconsidered issues and questions that have come up during the literature review and composition of the theoretical framework.

The following section, part C, assesses the case of the Austrian National Tourist Office. The empirical part of the thesis will be largely made up by the findings gained through expert interviews, as well as secondary data collected from internet and other company sources. Firstly, the most important facts and figures about the organisation are presented, giving the reader an insight into the DMO’s history, main objectives, mission and vision. The main markets where the ANTO is operating are introduced, including a sub-chapter on the ANTO’s marketing activities, particularly in the market Sweden. Then, the focus lies on the organisation’s branding strategy. The author will attempt to establish a connection between image related issues learned throughout the literature review for the thesis and the ANTO’s practices, which will subsequently be critically analysed.
As space does not permit the detailed presentation of all findings and insights gained during the expert interviews, the most critical and informative statements will be incorporated in this chapter. A complete transcription of the interviews will be attached in the appendix and gives the reader the possibility to get an even deeper insight into the topic by reading the exact questions and answers.

Finally, in chapter five, conclusions from the knowledge obtained and insights gained during the composition of this thesis are drawn. First of all, the knowledge contribution of this thesis is outlined. Then, the focus of the thesis’ conclusion lies on precisely answering the proposed research questions by providing the reader with a brief summary of the research results, including critical analyses and outlooks concerning the topic of destination image and marketing in general, and in the case of the Austrian National Tourist Office in particular. The author’s personal reflections, as well as a sub-chapter on limitations and further research complete the dissertation.
PART B

THEORETICAL FRAMEWORK
2 DESTINATION IMAGE

2.1 Definition

While some individuals have a positive image about a destination, others have a negative one. Some decide to spend their holidays at a certain place, others choose another one. What influences these individual differences? Questions like these have been in the focus of research in several disciplines such as social psychology, sociology or marketing, all using the concept of image (Frías, Rodríguez & Castañeda, 2008, p. 163). In tourism research, images are more important than any tangible resources because what motivates consumers to act or not to act are perceptions, rather than reality (Gallarza, Gil & Calderón, 2002, p. 57).

The universally acknowledged importance of destination image has led to a substantial body of research on this topic. Not only in the field of tourism, but also in several other disciplines, including geography, environmental planning, psychology and marketing, significant research has been carried out (Echtner & Ritchie, 1991, p. 3). Echtner and Ritchie (1991, p. 4) point out that destination image research can be seen as a subset of the broader field of imagery research, which principally belongs to the field of psychology. However, the research line is characterised by its multidisciplinarity, meaning that there are many different approaches to studying destination image (Gallarza, Gil & Calderón, 2002, pp. 56-57).

According to Jenkins (1999, pp. 1-2), it is problematic to determine an exact meaning of tourist destination image (TDI). The definition of image and its components varies among researchers and there is still no consensus. In fact, there are almost as many definitions of image and attempts to conceptualise it, as scholars devoted to the topic. There is definitely a lack of a conceptual framework for studying destination image and despite widespread interest in a common unified theory, no single approach has been universally accepted so far. The term has been used in a wide variety of contexts including those relating to the destination images projected and delivered by tourism promoters, the “stereotype” image of a destination held by public, as well as the unique destination image held by each individual. The most commonly cited definition of destination image is that by Crompton (1979, p. 18) “the sum of beliefs, ideas and impressions that a person has of a destination”. In this context, the term image is used to represent a simplification of a larger number of associations and pieces of information connected with a place (Day, Skidmore & Koller, 2002, p. 178). This definition is related to the individual, but from a marketing point of view, which is essential for this thesis, one has to be aware of the fact that images can also be shared by groups of people. This understanding allows the segmentation of markets and subsequently facilitates the formulation of appropriate marketing strategies, which will be discussed precisely in later chapters of this dissertation.

Research on the image of destinations began in the early 1970s with Gunn’s work on how destination image is formed, and Hunt’s work on how destination image is measured. Since then, within a period of around 30 years of research, the topic has become one of the most established in the tourism and leisure literature. Pike (2002) undertook a review of 142 papers published in the period from 1973 to 2000 that directly or indirectly investigated destination image topics. Hence, he provided a summary of key characteristics and a reference guide to previous studies within that field.
In general, there are three major emphases among different researchers on the definition of destination image. Crompton’s above cited definition represents the composite structure of the image construct. In addition, others make use of attitudinal components such as affect and cognition to explain the concept of image. A third approach is to consider image as an overall visual or mental impression of an object, place or experience (Rezende-Parker, Morrison & Ismail, 2003, p. 244).

Besides, it should be mentioned that in the course of research it was found that the terms destination image and tourist destination image (TDI) have the same meaning, wherefore they will be applied interchangeably within this thesis.

2.1.1 Primary versus secondary image

A differentiation has to be made between primary and secondary image. Primary image is the information acquired through personal experience or visitation of the destination. It may differ from the secondary image, which, in contrast, is basically perceived before experiencing a destination. The secondary image is formed by organic, induced and autonomous information sources, to which the consumer is exposed. Obviously, the effect that external information can have depends considerably on the types and the number of sources. The different sources of information will be discussed and explained in depth in this paper’s chapter on destination image formation. When individuals actually visit a place, the image they form after visitation is much more realistic and complex than the one formed through secondary information (Beerli & Martín, pp. 661-662). In this respect, it is suggested that although many people have an image of destinations they have not yet visited, the most accurate, personal and comprehensive is formed through going there (Molina, Gómez and Martín-Consuegra, 2010, p. 724)

Echtner and Ritchie (1993, pp. 4-5), for example, point out that people who are more familiar with a destination hold a more holistic image than those less familiar. However, not only familiarity with, but also the number of visits and the intensity of the stay can have an influence on the perceived image. As no research work on the topic of visit intensity has been discovered yet, there is a lack of agreement about its impact. However, it seems only logical to assume that the degree of involvement during the stay, such as for example developing relationships, consequently changes the image a person holds of that destination.

2.1.2 Pre-visit versus post-visit image

Another direction towards which different types of destination image research move is the differentiation between pre- and post-visitors’ image perceptions. This approach presumes that tourists’ image perceptions vary over time, relating it somehow to the above examined separation of primary and secondary image. Gallarza, Gil & Calderón (2002, p. 72) discuss the dynamic nature of the concept, claiming that image is not static but changes depending on the variables space and time. According to them, image always corresponds to an interiorisation of perceptions and not every individual has the same perceptions. They argue that destination image refers to perceptions of tourists at a destination, corresponding to the perceived contribution of various services to be found there, such as for example accommodation, food or transport. In contrast, other researchers dispute that the use of image perception is actually theoretically inappropriate in case potential tourists have not yet experienced it through pictures or visitation.
Seongseop, McKercher and Lee (2009) review the corresponding published literature and conclude that most of the studies indicating change of image perception over time are prone to “measurement frequency deficiencies”, implying that the surveys are conducted at inadequate times or not often enough. For example, most destination image studies are carried out on a one-off basis, either before leaving to a destination or when returning. Often, the respondents’ memory recall is limited, especially when it comes to questions about the expected image before a trip and comparing it to the image formed during the stay. Accordingly, also Gallarza, Gil & Calderón (2002, p. 61) state that the only correct way of assessing the influence of time on image formation can be the realisation of longitudinal studies, even though this kind of analysis is difficult to carry out in tourism. In order to overcome these problems, Seongseop, McKercher and Lee (2009, pp. 715-717) managed to carry out a survey over three time periods, namely before, during and after a trip. The aim of the study is to keep track of image perceptions of tourists from departure toward a destination to return to the origin, using the same sample. The investigation measured Korean tourists’ image change throughout a package tour to Australia. The results indicate that there is a considerable difference in image change between cognitive and affective perception. In order to understand the implications of these findings, the concept of cognitive versus affective image is explained below.

2.1.3 Cognitive versus affective image

A common agreement among researchers in several fields is that the image construct includes both cognitive as well as affective evaluations. That is to say, image is considered as a concept shaped by the consumers’ reasoned as well as emotional interpretation. Whilst cognitive evaluation can be referred to the knowledge or beliefs about a certain destination, the affective evaluation refers to feelings towards that place or the attachment to it. Thereby, a cognitive evaluation of objects is said to build the basis, on which later on affective responses are built as a function of the cognitive assessment. As a result of combining these two evaluations, an overall destination image is formed (Baloglu & McCleary, 1999, p. 870). This compound image indicates the overall positive or negative evaluation of the destination or product in question (Beerli & Martín, 2004, p. 658).

In terms of image perception change over time, it was found that affective image is more volatile than cognitive image. This shows that the perception of affective image is likely to undergo changes due to emotional conditions. Cognitive images, on the other hand, are mainly based upon prior information and knowledge acquisition and are therefore more stable and likely to last longer (Seongseop, McKercher & Lee 2009, p. 717).

2.1.4 Attribute-based versus holistic image

Gallarza, Gil & Calderón (2002, p. 70) refer to Reynolds and Guttman (1984), who argue that any product or service image can be seen as a construct made up of multiple items. Also in a tourism context, the existence of a multiplicity of variables making up the identity of a destination’s image has been widely recognised. In that case, the product would be a destination and the numerous variables are the components of the holistic image. Accordingly, MacKay and Fesenmaier (1997, p. 538) allege that “destination image is a composite of various products (attractions) and attributes woven into a total impression”.
Gallarza, Gil and Calderón (2002, pp. 63-64) provide a review of empirical TDI studies measuring attribute-based images over a timeframe of two decades. They only consider the most universal attributes and group similar ones, just as fishing and rafting, into broader categories like “sports facilities”. To give a general idea of possible image elements, the following figure summarises the most common attributes used in image research.

![Functional and Psychological Attributes]

The fact that the attributes are organised along a functional/psychological axis is noticeable. This approach is based on Echtner and Ritchie’s (1991) model of destination image dimensions and will be discussed in detail in the upcoming sub-chapter.

Yet, despite the almost unanimous and universal acknowledgement of the multidimensionality of tourist destination image, some studies highlight rather global interpretations of image. Along these lines, image is considered a holistic perception of a destination, whereby an individual internally assesses his or her perceptions based on holistic rather than functional attributes. This judgement often happens unconscious. Yet, at this point it is still unclear whether a destination image can be an output in itself or has to be based on underlying attributes (Gallarza, Gil & Calderón, 2002, p. 70).

2.1 The dimensions of destination image

Many researchers agree that with their work “The meaning and measurement of destination image”, Echtner and Ritchie (1991) have contributed greatly to the development of a destination image framework, which indicates that destination image consists of functional characteristics, relating to the more tangible aspects of a destination, and psychological characteristics, concerning the more intangible characteristics. Echtner and Ritchie base their findings on observations from product image research (McInnis & Price, 1987),
where the decision making process depends on people’s perception of products as both individual attributes on the one hand, and holistic impressions on the other. Moreover, they examine Martineau’s (1958) approach to differentiate between functional and psychological components when it comes to evaluating a retail store. Thereby, the functional characteristics are directly observable and measurable, like for example prices. Psychological characteristics, on the contrary, cannot be as easily measured. An example for these features would be the atmosphere or staff friendliness. This also explains the common method of organising attributes along this functional/psychological line, as mentioned in the previous sub-chapter.

Based on these notions, Echtner and Ritchie (1991, pp. 7-8) opine that the attributes/holistic and the functional/psychological axes are just as well applicable in a tourist destination image concept. When uniting the two axes into a two-dimensional model, then there would be four components of destination image: a functional-holistic image (eg. a mental picture of the destination’s physical characteristics), a psychological-holistic image (eg. the general feeling an individual has about the atmosphere at the destination), a functional-attribute image (eg. high prices, warm climate) and a psychological-attribute image (eg. general safety, friendly local people). However, as can be seen in the figure below, Echtner and Ritchie’s conceptual framework includes an additional dimension, ranging from common to unique.

Subsequently, the model should be envisaged in three dimensions. It is suggested that destination image should be defined and measured along these three dimensions:

- attributes - holistic
- functional - psychological
- common - unique

![Figure 2. The components of destination image](source: Echtner & Ritchie, 1991, p. 8)
According to the model, destination image is separated into two different components, namely attributes and holistic. Each one of these components can then comprise functional or psychological characteristics, which could again reflect common or unique features of a destination (Rezende-Parker, Morrison & Ismail, 2003, p. 244). Interestingly, the common/unique dimension of their conceptual framework is often overlooked (Jenkins, 1999, p. 5).

Still, this third dimension implies that “images of destinations can range from those ‘common’ functional and psychological traits to those based on more unique features, events, feelings or auras”. In other words, on one end of the continuum, the destination image is composed of common features on which different destinations can be compared and evaluated, such as the price level or staff friendliness. These characteristics, again, can be of functional or psychological nature. On the other end of the continuum, destination images are unique to each destination. In a tourism context, truly unique functional characteristics are not hard to provide, they exist at any destination: exceptional monuments, sights, symbols or distinctive landscapes. Hence, Paris might evoke an image of the Eiffel Tower, Egypt the pyramids, and so forth. On the other hand, destinations are often distinguished by distinctive ambiances. When it comes to unique and intangible atmospheres, Paris, as an example, is often perceived as romantic (Echtner and Ritchie, 1991, pp. 6-8).

However, it should be recognised that there are undeniably certain overlaps between the divided sections of the model. In other words, impressions are influenced by each other. For example, perceptions of individual destination attributes might be influenced by overall feelings and impressions about it. In return, holistic impressions are probably almost always based on combinations of numerous attributes. Furthermore, the line between functional and psychological characteristics is not very clear. Hence, it is somewhat complex to categorise images, such as for example perceived cleanliness, as a complete functional or complete psychological attribute, as it would mostly be a mix of both, situated somewhere along the continuum (ibid.).

2.2 Destination image formation

Destination image formation usually incorporates two ends of information transmission, namely the destination and the receiver. MacKay and Fesenmaier (1997, p. 559) describe destination image formation as “a composite of individual inputs and marketer inputs”. Hence, image formation has both a supply-side (the destination, for example by marketing activities) and a demand-side (the receiver) component (ibid., p. 539). It has to be understood that the projected image and the received image are not always the same. The discrepancy might be due to alteration and modification of the message either by the source of communication or by the receiver. Moreover, it is critical to be aware of the fact that destination-originated messages are not the only ones reaching the recipient. Image formation happens just as well through personal experience, for example when visiting a destination personally. Images can even be formed in the absence of any commercial information. Some countries, for example, might have great tourism potential because they receive enormous free publicity by news and media, either positive or negative. This can result in high awareness of a country and people building images of it, without having to conduct any form of actual tourism promotion (Tasci and Gartner, 2007, pp. 414-416).
Existing literature shows the development of destination image to be a multi-stage process. Travel consumers’ initial image is formed though exposure to a variety of information sources, which are beyond the control of destination marketers. This original image is later tried to be manipulated by controlled marketing messages in order to increase the destination appeal (Hanlan & Kelly, 2005, p. 164). Hence, organic components, such as mass media, education or books, as well as induced components, which are those coming from promotional efforts to attract people to the destination, are recognised. In 1972, Gunn suggested a seven-stage theory. In that way, he breaks the image formation process into component parts, related to the individual stages of the travel experience. Thereby the relationship between induced and organic components is demonstrated (Gallarza, Gil & Calderón, 2002, p. 71). Jenkins (1999, pp. 3-4) provides a very clear and comprehensible summary of this approach. As can be seen in Figure 3, in phases one and two, destination images are formed based upon secondary sources of information, whereas throughout the later phases actual first-hand experience modifies these images.

![Stage-theory of destination image formation](Figure_3.png)

Figure 3. Stage-theory of destination image formation
Source: Jenkins, 1999, p. 4
2.2.1 Image formation agents

Beerli and Martín (2004, p. 661) recognise the existence of a set of factors which have an influence on the formation of image. These factors clearly involve both information from different sources as well as the individual characteristics of the person forming an image of a certain tourist destination. Jenkins (1999, pp. 2-3) makes very similar observations and divides the influencing factors into demand and supply factors. She believes that each person’s image of a place is unique, comprising the own imaginations and memories. Accordingly, the demand factors would include psychological characteristics, socio-economic features, personal motivations, perceptions and experiences. Supply factors would embrace external information from sources like education, media and marketing. Baloglu and McCleary (1999, p. 870) established the perhaps most comprehensible model of image formation agents and clearly illustrate the differentiation and interrelationships between the personal factors and the stimulus factors, as they call them. Figure 4 below shows this graphic.

2.2.1.1 Personal factors

An individual’s personal characteristics, which can also be described as internal factors, have a big influence on image formation. This has to be considered especially from a perspective of consumer behaviour, because it ultimately concerns the destination choice process. Personal factors refer to psychological characteristics such as an individual’s values, motivations, personality or lifestyle, as well as those of a socio-demographic nature. In the above graphic representation, these are grouped under the designation of social factors, comprising factors like age, education, marital status and others, which could moreover include gender, social class, family lifecycle, or the place of residence. All of these personal factors have an impact on a person’s cognitive organisation of perceptions and therefore directly affect the perception of the environment and the resulting images. Obviously, people with different backgrounds perceive places very differently. Thereby, it is especially the affective component of image that is under influence of personal factors. Motivations, for example, are directly linked to feelings aroused at a certain place. And since the affective dimension of image can have an influence on the overall image, so can motivation (Beerli and Martín, 2004, pp. 663-664).
2.2.1.2 Information sources

Destination image, in very simple terms the overall evaluation of the extent to which a destination is liked or disliked, is closely linked to information, as in case of lack of information the formation of an image is impossible. Therefore, numerous researchers have based their studies on the notion that information is positively related to image (Frias, Rodríguez & Castañeda, 2008, pp. 167-168). Information are forces having an influence on forming perceptions and evaluations and there is a great diversity of information sources individuals are exposed to. The related work is based on Gartner’s (1993) framework and typology of eight image formation agents. This categorisation depends on the degree of control by the destination promoter, and on the level of credibility on the part of the receivers, respectively. The different agents are:

- overt induced I
- overt induced II
- covert induced I
- covert induced II
- autonomous
- unsolicited organic
- solicited organic
- organic

Day, Skidmore and Koller (2002, pp. 178-179) as well as Beerli and Martin (2004, pp. 661-663) explain the framework very well and detailed and base their works on it. Thus, overt induced I information consists of traditional forms of advertising such as television, print media, or brochures. Destination marketing offices apply this kind of advertising in order to develop certain intended images in the minds of target groups. Thus, the DMO can have a direct influence on which information is communicated, however, the messages from these formation agents are considered to have the lowest credibility. Overt induced II comprises information received from tourism intermediaries. An example would be promotion material like brochures used by wholesalers who are interested in the travel decision process. Sometimes, the travel distribution channel members cooperate with destinations and undertake marketing with the provided images. Yet, the receivers of these messages assign slightly higher credibility to these materials as if they would come directly from a DMO. As a further formation agent category, covert induced I, includes information which is projected by a secondary party, endorsed via traditional advertisement. The spokesperson might be a celebrity and is usually chosen depending on their degree of popularity and credibility. Covert induced II also involves message delivery by some highly credible person and again, the destination promoters have a direct influence on the content. However, in this case the receivers should ideally not be aware of the manipulation through the destination. Covert induced II agents usually appear in the form of unbiased articles and reports about a place. Obviously, credibility rises as there is no visible connection between the projected image and destination promotion. On the contrary, autonomous image formation agents also consist of articles, films or reports, but these are independently produced and should not be related to marketing or promotional efforts on the part of the destination, whatsoever. Generally, this category is divided into news and popular culture, such as music and films. Due to its high market penetration, this type of agent perhaps has the power to dramatically change a destination’s image in a very short period of time. Organic information mostly comes from friends or family and can be
either *unsolicited* or *solicited*, that is unrequested or requested. The individual who communicates the information usually has already visited the destination under consideration or believes to know about it. If the person receiving the information did not ask for it, the credibility is only moderate. *Solicited organic* information comes from a knowledgeable source and is therefore exceptionally credible. This stage is also referred to as word-of-mouth advertising WOM. The tremendous importance of WOM is discussed by Hanlan & Kelly (2005, p. 167) who found out that word of mouth is the most influential source of information concerning image formation. In their study, 95 per cent of informants identified this agent straight away. Finally, the last agent in Gartner’s framework is *organic*, which is made up of actual visitation of the destination and leads to the formation of a new and more complete image. The amount and type of information certainly influence the image which is being formed. It has to be taken into account that information overload might not lead to a higher but rather to a lower overall image (Frias, Rodríguez & Castañeda, 2008, p. 168).

In Baloglu and McCleary’s model of image formation agents, as can be seen in Figure 4, previous personal travel experience is considered to be a stimulus factor. However, it does not imperatively have to be categorised as such. In fact, other researchers (Beerli & Martín, 2004, pp. 660-664) classify previous experience as a part of the personal factors having an influence on the perceived image. In a tourism context, they state, past experience may even be more important than any external information, because the need to receive information becomes weaker and at the individuals anyways tend to rely more on their personal experience.

### 2.3 Destination image measurement

Due to the beforehand described multidimensionality of tourism destination image, its measurement and assessment is quite complicated. Generally, when it comes to image measurement, the researcher has a considerable responsibility, because the scenarios are always dissimilar. There is an expressed need for choosing the appropriate measurement methods and instruments which should be adaptable to the complex nature of the image and able to capture the many components of a TDI.

#### 2.3.1 Different techniques

Generally, there is a differentiation to be made between structured and unstructured methods. According to Jenkins (1999, p. 5), most studies fail to give a holistic picture of destination image because of the wrong methods used.

##### 2.3.1.1 Quantitative and structured

Up to now, there has been a clear preference of quantitative structured measurement methods, which concentrate on the attribute component of images. Thereby, the researchers pre-determine a set of common image attributes. Individual respondents are then asked to rate these sets subjectively or to characterise certain stimuli using standardised rating scales such as Likert scales or semantic differential scales. The most commonly used is the seven-point Likert scale asking the respondent to indicate a degree of agreement with each of the items covered in the questionnaire. The answers range from for example “strongly agree” over seven steps to “strongly disagree”. Semantic differential scales, on the other hand, cover statements like for example “high quality” on one side and
“low quality” on the other, or “wide selection” and “low selection”. Here, the respondent has to decide on one of several boxes between the two extremes, according to his opinion concerning the quality or the choice of selection of the attribute in question. The ratings of each attribute later on result in an image profile. First of all, using simple statistical methods is easy to administer and simple to code for further processing of the data, resulting in easy analysis. Secondly, statistically organised image analysis facilitates the comparison between different destinations, which might be of interest to destination managers. However, there are certainly also disadvantages to this kind of TDI measurement. As this type of measurement is based on an a priori list of attributes, it might be quite unreliable, because the attributes the individual respondents are supposed to rate might actually not mean much to them. Hence, one obvious disadvantage of structured methods is the fact that the respondents have to think about the destination image in terms of the pre-specified attributes, and not the attributes they might have in mind themselves (Jenkins, 1999, pp. 5-6). Sometimes, for example when the respondents have not yet visited the destination or have less knowledge about it, they might lack understanding of all the pre-determined attributes (Prebensen, 2007, p. 749). Furthermore, it is easily possible to miss certain important attributes, which impedes the completeness of structured methods. Echtner and Ritchie (1991, p. 10), too, pronounce that unless considerable effort is spent during the initial design phase of the frameworks, the research might fail. In the following statistical analysis phase, a predominance of multivariate and bivariate methods is observable. The most commonly used are information reduction techniques such as multidimensional scaling and factor analysis. They are in the majority, because they allow the capture of multidimensional image elements and partly let image be numerically instrumentalised (Gallarza, Gil & Calderón, 2002, pp. 65-67). Yet, going into detail about these rather complex statistical methods would be beyond the scope and interest of this thesis.

2.3.1.2 Qualitative and unstructured

In order to avoid shortcomings such as the ones described above, it might be more appropriate to apply unstructured or semi-structured qualitative techniques, which allow comprehending more aspects of tourists’ actual images of a destination. Qualitative or unstructured methods are expected to better include the true images people hold of destinations and to avoid analysing attributes which are actually irrelevant (Prebensen, 2007, p. 750). Unstructured methods allow the respondents to freely describe their impressions of a destination. These free images can be gathered through various techniques and are subsequently sorted and categorised in order to determine the existing dimensions of image. Echtner and Ritchie (1991, p. 10), for example, propose qualitative research in the form of focus groups in order to assemble a more complete inventory of attributes to work on. The chance to deliver a more holistic image is much bigger with this approach. Moreover, another advantage is the fact that there is no interviewer bias and important image components are not as easily missed. Possible disadvantages of qualitative image measurement are the limitation of statistical or comparative analyses of the results. Furthermore, it can never be foreseen into how much detail the respondents will go in their image evaluation.

One of the most popular qualitative techniques is content analysis. This method analyses the content of written information such as travel guidebooks, or visual information such as pictures shown in brochures. In that way, images projected and communicated by tourism
boards can be identified. But the analysis does not necessarily have to be based on written or visual information; another possibility is to investigate the content gathered through in-depth interviews or focus groups. Instead of analysing texts or photos and categorising images from them, conversations with respondents talking about their image of certain destinations are taped, transcribed, and important constructs are extracted. In order to avoid any bias on the part of the researchers, it is essential to design the categorisation process as transparent as possible (Jenkins, 1999, pp. 7-8).

*Free elicitation*, in the form of *word association*, is a very popular method in the field of marketing research. One possibility to apply this method is to ask people which words in their opinion best describe a certain place as a tourism destination. Consequently, the responses are coded into similar categories and their frequency is measured. Rezende-Parker, Morrison and Ismail (2003, pp. 249-255), for example, asked three open-ended questions in order to get subjective statements about the destination Brazil. Respondents were asked to provide the characteristics that come into their mind when they think of Brazil as a tourism destination. Moreover, one question covered the atmosphere or mood expected in Brazil. The third question was “Please list any distinctive or unique attractions that you can think are in Brazil”. According to their answers, respondents were then grouped into various clusters.

*Photo elicitation* is conducting open-ended interviews guided by pictures, either from induced tourism brochures, or even from personal holiday snapshots. In times, where our world is increasingly dominated by visual images, researchers should more and more support the use of photographic stimuli in their image studies (ibid., pp. 7-9).

In her study, Prebensen (2007, p. 750) aimed to uncover French tourists’ image about Norway by the use of *photo elicitation* and *word elicitation*. Thereby, as a basis for associations, pictures of “typical” Norwegian icons like ice fishing, dog sledges or Northern lights were shown to the survey participants. Moreover, respondents were asked what comes to their mind when thinking about certain words like “Norway”, “Arctic sea” or “dog sledge adventures”.

Another example of picture elicitation put into practice is the study by Day, Skidmore and Koller (2002), who carried out an image positioning research in order to find out the motivating factors for potential visitors to Queensland in Australia, and to identify which visual images would best describe these factors. They selected about 80 pictures in the five categories beaches, animals, nature, city scenes and people. Respondents were asked to rate the motivational value of each of the images and the results showed that nature shots of beaches and animals reached the highest scores, which is important information for tourism offices who want to adapt their promotional material to prospective visitors’ motivations (ibid., pp. 178-180).

Another image study was completed by Chi and Qu, who explored the relationships between destination image and destination loyalty on the example of the American tourist destination Eureka springs. In addition to the already described techniques, Chi and Qu (2008, p. 627) applied content analysis of corresponding websites. Another method they used was *managerial judgements*, meaning that tourism managers were asked for their professional opinion about the chosen image attributes.
O’Leary and Deegan (2003, p. 216) investigate qualitative and quantitative images of Ireland as a tourism destination in France and apply both kinds of measurement approaches. Firstly, in the quantitative phase, they let respondents rate the pre-visitiation performance of a number of destination attributes like “welcome”, “discover something new” or “beautiful scenery”. In addition, open-ended questions aimed to find out a more complete image. As destination image should be as holistic as possible, it is necessary to combine the data from the attribute-based results with the information provided by the qualitative open-ended enquiry. Similarly, the findings from Prebensen’s (2007, pp. 753-754) study reveal that different techniques trace different image types and that it is crucial to employing more than one technique when all the various identities of a destination’s image should be explored.

Jenkins (1999, p. 7) also suggests that studies should combine qualitative and quantitative methods. According to her, qualitative measures could be used to elicit relevant image attribute constructs and dimensions of the interviewed population directly, rather than of the researchers themselves. Once relevant constructs are developed, tourists’ according destination image is measured in a subsequent quantitative phase.

2.4 Country- and culture-related influences

2.4.1 The country of origin effect

According to MacKay and Fesenmaier (2000, p. 417), the formation and evaluation of image have, in a tourism context, not typically been examined from a cross-cultural perspective. However, they do refer to studies by Hofstede (1991) and Triandis (1972), whereby people within a culture share common beliefs, meanings, values, attitudes and norms. As the influence of these value structures is expressed through lifestyle and consumer behaviour patterns, it would be expected that cultural background mediates the way people view images of tourism destinations. Earlier in this thesis, it has already been discussed that amongst others the personal, psychological as well as social factors have an influence on how people perceive images. Beerli and Martín (2004, p. 678) state that the country of origin is the socio-demographic characteristic which exerts the greatest influence on both cognitive and affective components of image. It is presumed that, when it comes to destination promotion, it would be desirable to follow different communication strategies depending on the tourists’ country of origin. Yet, one should not be too incautious with jumping to conclusions about the influence of culture on the perceived image, for the concept of culture refers more to societies than to states or countries. Societies and countries of origin, then again, should not be considered synonymous.

MacKay and Fesenmaier, however, are certain that attributes contributing to image perception may vary across countries of origin. Therefore, multinational tourism research not only involves identifying and comprehending the destination under consideration but also tourists’ origins and the relevant dimensions for image evaluation (MacKay & Fesenmaier, 2000, p. 422).

2.4.2 The relationship of product country image and tourist destination image

Product country image (PCI) and tourist destination image (TDI) are two fields of research which have evolved separately. It is interesting to note that the sources of information for the majority of products and services are mostly commercial, whereas destination images
appear to be stemming from a much wider spectrum of information sources. The reason behind this particularity is that there is a link between the destination image of a particular country and its national image. Thus, destination image incorporates information from non-commercial sources regarding various historical, social, economic and political aspects about the country or destination in question (Echtner and Ritchie, 1991, pp. 3-4).

As already discussed throughout the hitherto parts of this paper, tourist destination image refers to imagery perceptions of destinations. Product country images, in contrast, are about the perception of countries concerning purchases whose production is related to these countries. In this regard, the examples “made in” or “designed in” are considered important terms. In international business research, the relationship between the image of a country and the image of the products made there is one of the major and most examined subject matters. Even though distinct research communities and literature have focused on the two different fields, it has been found that there are many overlapping interests and constructs. Nadeau and his research team (2008) observe that the core challenge of both streams is to investigate complex images about certain places and in how far these images have an effect on the behaviour and decision of consumers. According to them (ibid., p. 85), advances and developments in the area of PCI can make significant contributions to the research of TDI.

Several touch points between PCI and TDI constructs have been found, indicating that there is a possibility for convergence between them. First of all, place-branding of products is one of them. It is the promotion of products in platforms like media, using images of any locations, including countries and tourist destinations. It can be said that tourists’ views of countries or destinations are certainly related to these portrayals. Another area of potential parallel for PCI and TDI is the influence that major events can have on the image of a place. Events do not necessarily change the image of a place, however, some of them are specifically organised in order to enhance tourism and sometimes also have an effect on other uses concerning overall country image, such as exports or investment attraction. Finally, tourism and country images appear to have a special two-way relationship. On the one hand, travelling to a certain country always provokes an image change, sometimes even from a simple stereotypical idea to one that actually contains the real resources and features of the country. This correlation has caused tourism to become an essential and influential control variable in product country image research. Moreover, the image which is established as a result of the touristic experience there is expected to be positively related to the export of products and services from the visited country. On the other hand, the overall image of a country, with its products and services produced there and the respective quality, have the power to directly influence the intention to visit it as a tourist (Nadeau et al., 2008, pp. 89-90).

The construct “product” is composed differently in PCI than it is in TDI research. In a general country context, a product usually represents tangible goods or services. In tourism, on the contrary, the product is rather described as the destination experience itself. Nadeau, Heslop, O’Reilly and Luk (2008, pp. 90-91) suggest that destination image could be sold as a product, which would connect underlying PCI structures to the tourism context. This is also based on the notion that foundation beliefs about a country and its people have a direct influence on destination beliefs and evaluations. Generally, tourism can be seen as a way to expose oneself to other countries and form new images about them (ibid., pp. 101-102).
2.5 Effects of image on destination choice and consumer behaviour

The ultimate goal of any destination is to influence possible tourists’ travel-related decision making and choice through marketing activities and consequently attract them to their destination. Therefore, no matter how the subject is approached, researchers and destination managers are in consensus about the importance of image for the touristic success of a destination (Tasci and Gartner, 2007, p. 413). It has been demonstrated by research that image is a valuable concept in identifying and comprehending tourists’ destination selection process. Hence, there is a clear correlation between destination image and visitation intention. The initial phase of forming an image before the actual visitation of the destination is considered to be the most important stage in the selection process (Baloglu & McCleary, 1999, pp. 868-869). Since tourism products are mainly intangible and the potential traveller has no or only limited knowledge about them, image is believed to represent the destination and subsequently has the power to influence destination choice (Tasci and Gartner, 2007, p. 419).

When it comes to destination choice, secondary information sources, providing the information for image formation before experiencing a destination, basically fulfil three functions. First of all, obviously, they create an image. They also minimise the risk that the destination in question might entail, and finally, they can serve as a mechanism for a later justification of the eventual choice made (Friás, Rodríguez & Castañeda, 2008, p. 165 cited following Mansfeld, 1992, n.p.a.). The importance of well-formulated marketing communication is widely recognised, based on the idea that this form of tourist information can generate awareness and interest, stimulate desire and finally results in choice action. Tourism marketing will be discussed thoroughly in chapter three of this thesis.

Sirakaya, Sonmez and Choi (2001) conducted a study with the aim of determining in how far images can predict the chances of potential travellers to select a certain place as vacation destination. In their research they attempted to gain a deeper understanding of the role images can play in destination choice of a particular market segment. It was found that people can apparently compartmentalise their mental pictures and make an evaluation of each image according to its importance for the decision concerning the eventual choice. This is important for destination managers, who should also be aware of the fact that not all images play equal roles and that some have to be managed more effectively and carefully than others (ibid., p. 138).

However image not only affects pre-visit behaviour and destination choice, but also the behaviour during and after a visit. Image has the power to influence the process of choosing a certain destination, the following evaluation of the trip there, as well as the tourists’ future intentions (Chi & Qu, 2008, p. 624). During a stay, the variables of length of stay, enjoyment and satisfaction are said to be related to the initial image. Also the effect of image on post-visit behaviour has been identified, however, this is an aspect largely neglected in research. The few studies dealing with it are mainly trying to explain the correlations between destination image and re-visitation intentions or destination loyalty (Tasci and Gartner, 2007, pp. 418-421). As destination image can have a positive effect on satisfaction and plays an essential role in achieving tourists’ loyalty, it is essential to improve the overall image of a place held by an individual, so he or she can make a ultimate positive assessment of the stay, transmit positive word of mouth to others and maybe even intend to revisit the destination (Chi & Qu, 2008, pp. 632-633).
“By understanding the relationships between future behavioural intentions and its determinants, destination tourism managers would better know how to build up an attractive image and improve their marketing efforts to maximize their use of resources.” This notion builds the basis for Chen and Tsai’s (2007, p. 1116) study on the correlation between image and tourist behaviour. Based on previous research, they establish the hypothesis that destination image, as well as the evaluative factors trip quality, satisfaction and perceived value, and behavioural intention mutually affect each other and hence stand in a reciprocal interrelationship. Their findings confirm that destination image has both a direct and an indirect influence on behavioural intentions. Once more, it is observed that the influencing power of destination image is not restricted to the point of destination selection, but has an effect on tourists’ general comportment (ibid., p. 1120).

2.6 The functional relationships of destination image

Aiming at clarifying the complex image formation process and the effects of image, some studies investigate the relationship between variables. The model below very well sums up what has been explained in the hitherto chapters about destination image. With this illustration, Tasci and Gartner (2007, p. 422) provide a clear and comprehensible overview of the complicated relationships between functional aspects influencing destination image. The model is a reciprocal and dynamically interactive system, in which none of the variables can be seen in isolation; each of them can be the cause or effect of a change in the interrelationship to each other. The variables have already been discussed beforehand. Therefore, in order to understand the particular factors built-in into this model, it should here be referred to chapters 2.1 to 2.5, which give the complete relevant in-depth descriptions and explanations.

Figure 5. A model of destination image and its relationships
Source: Tasci and Gartner, 2007, p. 422
As can be seen from the presented model, a wide spectrum of different input factors have an influence on the destination image formed. They belong to either the supply- or the demand side and can be of controllable (dynamic), semi-controllable (semi-dynamic) or uncontrollable (static) nature. What all of the input factors have in common is that they provide a destination’s image capital.

One apparent implication of the presented model is that each individual person holds a very unique image of a destination. The reasons for this uniqueness are manifold, including personal needs to be met, prior experiences made, and cultural motives. Even though there is a lack of research on cultural influences, it is widely recognised that destination image has to be related to culture. The same environmental input factor might, for example, be interpreted totally dissimilar by different cultures. However, even though destination images are completely diverse, there is definitely enough commonality among them to create meaningful market segments. Hence, this model illustrates a complex environment in which destination image development activities, ideally according to predefined market segments, have to be carried out. This can be done by implementing programmes of image assessment and, if necessary, modification (Tasci & Gartner, 2007, pp. 421-423).

2.7 Strategic image management

As suggested in the implication of the above presented model of destination image and its functional relationships, images need to be properly managed. In this regard, Day, Skidmore and Koller (2002, p. 178) propose a method for strategic image management. The process to manage a destination image effectively and efficiently has to be performed on a continuous basis. First of all, the images that have representative meaning to target audiences have to be identified. The next step is to correlate specific images with diverse demographic populations within these audiences. In order to support an already existing image or to develop a new one, the benefits of the place have to be positioned and communicated to the target group.

On the one hand, it is apparent that the image of a destination forms a critical factor influencing potential tourists’ decision making behaviour. Some authors even opine that the mere existence of an image in the mind of people is more important than whether this image is representing the truth about the place’s features, or not (Jenkins, 2001, p. 2 cited following Mayo, 1975, p. 15). On the other hand, Beerli and Martin (2004, p. 677) for example, advance the view that it is critical that the image building messages transmitted to the market correspond to the reality of the destination and harmonise with what it really has to offer. Hence, the development of the image must be fully based on reality. If this is not the case, the destination might not be able to satisfy the tourists coming there, resulting in a negative image which they possibly pass on via word of mouth.
3 DESTINATION MARKETING

Throughout the literature review in preparation for this thesis, the notion that destination image and destination marketing stand in a close interrelationship to each other has appeared in nearly all articles and works studied. Only during the last three decades the marketing of places has received increased interest and the field has accordingly become more sophisticated. This development is to some extent due to globalisation and the ever increasing number of international transactions, which obviously have an impact on the competitiveness of places (Baker and Cameron, 2007, p. 79). After the previous chapter on destination image, the purpose of this section is to give an insight into the field of destination marketing, including a focus on branding.

3.1 An overview of destination marketing

First of all, a clear distinction between place marketing and destination marketing should be made. As opposed to destination marketing, the broader field of place marketing is not limited to increasing the number of tourist arrivals. It rather has an effect on more expansive areas like regional and urban development, international relations, country positioning, as well as economic growth. Correspondingly, Kotler (1993), a pioneer and leader in marketing research issues, published a book on marketing places, where he examines how investment, industry and tourism can be attracted to cities, states and nations. Hence, place marketing basically embraces four core activities. To begin with, it engages in designing the appropriate mix of community features and services. Furthermore, attractive incentives for the existing as well as potential buyers and users of the place’s goods and services are set. These goods and services then have to be delivered in an efficient way. Also, the respective place’s values and image have to be promoted, so that potential consumers and users are aware of all the advantages (Kotler, Haider & Rein, 1993, p. 18). Although it is not the only nor the most important aspect, the importance of tourism for place marketing should not be underestimated. It must be considered as integral part of place marketing, because it supports and leads the development of a place brand (Baker & Cameron, 2007, pp. 80-81). The branding approach will be discussed in a later sub-chapter.

Against the above discussed background, now a definition of actual destination marketing shall be given. According to the United Nations World Tourism Organisation UNWTO (2004, p. 10), destination marketing “covers all the activities and processes to bring buyers and sellers together; focuses on responding to consumer demands and competitive positioning; is a continuous coordinated set of activities associated with efficient distribution of products to high potential markets; involves making decisions about the product, branding, the price, market segmentation, promotion and distribution”.

Destination marketing facilitates the success of tourism policy, which should ideally be in line with the strategic plan for overall regional development (Buhalis, 2000, p. 97). Baker and Cameron (2007, p. 81) point out that destination marketing involves using tourism for reasons like improving the overall image of the area in order to attract industry, increasing infrastructure that can also be used by the local community, achieving changes in the environment, or giving the locals more pride in their area. Thereby, tourism is often used as a means to an end rather than an end in itself. Anyhow, the fact that marketing has the power to positively influence destination development is widely acknowledged.
3.1.1 **Critical success factors for destination marketing**

After an extensive literature review on the topic, Baker and Cameron (2008, pp. 91-93) were able to identify a number of critical success factors that are all associated with a destination’s development of a successful marketing strategy. These factors are clustered into four different stages, according to destination brand building, which will be examined again in the sub-chapter dedicated to branding.

<table>
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<td>Tourism trends are identified</td>
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Source: Baker & Cameron, 2008, p. 93

Table 1. Critical success factors for destination marketing
As mentioned before, in today’s increasingly competitive world it is of utmost importance for places to differentiate themselves from each other. In order to be able to do so, they need a profound knowledge of their own strengths, weaknesses and needs as well as of the nature of the competitive environment. The understanding of these critical success factors, or CSFs, can help planning and implementing effective marketing strategies. Therefore, the above presented table can serve as a very useful help for destination managers and marketers to understand which issues should be addressed.

3.1.2 The need for collaboration and integration

Destination marketing is a particularly challenging form of the marketing art. The challenges are mostly related to the general complexity of the tourism product and to the many different kinds of stakeholders involved. The overall tourism experience consists of regions, resources and a combination of tourism products and services. The producer usually does not have the total control over the tourism product. The stakeholders involved in the process are a mix of companies of different sizes, public agencies, as well as non-profit organisations. There is a mix of professional and personal interests of all the people who live and work in the area, namely indigenous people, investors and businesses, tourists, tour operators and intermediaries, and other interest groups (Buhalis, 2000, pp. 98-99). However, on an individual basis, they do not have much control over the marketing of the destination product. DMO’s are usually created to take on the great responsibility for tourism promotion and visitor attraction and should ideally satisfy the needs of all these stakeholders. The total marketing mix usually consists of formulating the destination product, pricing the destination, distributing the destination’s product through the right channels, and promoting the destination. However, the mentioned lack of control over the tourism product is the reason for many DMOs’ decision to put their focus above all on the promotional aspect of the marketing mix (Baker & Cameron, 2007, pp. 81-82; Elbe, Hallén & Axelsson, 2009, p. 283). Still, Gretzel and her research partners (2006, p. 4) emphasise that nowadays much more is expected from them, namely leadership.

An additional problem in destination marketing is that in the public sector, destination marketing offices and national tourist organisations often do not have enough resources, proficiency or flexibility. Nevertheless, marketing should satisfy all stakeholders involved, for example by meeting the public sector’s social objectives, and at the same time the private sector’s economic goals. Therefore, there is an expressed need for collaboration and knowledge-exchange between the different stakeholders. Baker and Cameron (2007, p. 83) highlight the importance of public-private relationships, with the local government usually playing an especially important role. Amongst others, such partnerships with pooled resources are necessary because individual stakeholders would definitely not have the same promotional impact on potential tourists as they do in collaboration. As the involved actors’ interests often overlap only partly, DMOs need to mobilise resources and bring together the individual stakeholders in order to achieve a coordinated and integrated destination marketing process. The goal is to find suitable marketing solutions that benefit both the whole destination and also its actors. In fact, analysing and involving the stakeholders can mean various advantages to destination management and marketing offices. They find new areas to co-operate and receive benefits, while at the same time they can make sure that these stakeholders do no longer represent a potential threat. The level of collaboration can thereby vary considerably, meaning that there are different degrees of commitment and adaption on the part of the participating actors (Elbe, Hallé & Axelsson,
2009, pp. 283-287). However, in order to be able to fulfil this task of mobilising resources and reaching agreements, a DMO requires legitimacy. This means that the stakeholders must perceive that is has adequate competences to do so and that what it does can be beneficial to them. A DMO must always be perceived as the officially accepted representative of a destination (ibid., p. 295).

Similarly, Buhalis (2000) demonstrates in his work “Marketing the competitive destination of the future”, that in order to develop truly competitive destinations, there is a need for close collaboration rather than rivalry between the involved parties.

Destinations are exposed to changes within the industry as well as to threats from the external environment, which can challenge DMOs fundamentally. According to Gretzel and her colleagues (2006, p. 1), DMOs can react to such developments with three possible strategic responses. Either they decide to proactively shape the future and adapt to it, or they passively struggle through future crises. In any case, the chosen approach needs to be informed. Moreover, destination management and marketing offices must be characterised by a profound commitment to learning and change and at any time provide strong leadership in the course of defining where the destination is standing, where it has been, and, most importantly, where it is heading (Gretzel et al., 2007, p. 11).

3.1.3 Future issues in destination marketing – the 15 Cs framework

Advancing the view that a destination is one of the most difficult products to manage and market, Fyall and Leask (2007, pp. 53-61) unite the main issues impacting the future marketing of destinations in a comprehensive framework. Their so-called 15 Cs framework provides an effective instrument of conceptualising the most crucial subjects which continue to challenge destinations:

- complexity
- control
- change
- crisis
- complacency
- customers
- culture
- competition
- commodification
- creativity
- communication
- channels
- cyberspace
- consolidation
- collaboration

With *complexity*, the researchers indicate the already discussed fact that destinations are usually comprised of several stakeholders, components, and suppliers and convey different meanings to different markets. *Control* refers to the destinations’ often experienced inability to exert control over the destination product, which can lead to the undermining of strategic marketing approaches. Yet, a further issue considered is the probably upcoming
change of the separation between public and private sectors that has been so commonly been existing throughout destinations. The framework also includes concern about crisis, revealing the fact that many destinations all over the world have been dealing and will also in future have to deal with negatively influencing crises such as natural catastrophes and the like. But the universally present fear of these crises and of continuous change will probably be enough to prevent complacency, the feeling of self-righteousness and gratification, amongst destination marketers. Moreover, the customers of the future will definitely be more demanding, wherefore marketers need to adapt more innovative strategies. Culture can only be one of the means for product differentiation, when it comes to the battle against the fierce national as well as international competition. In a world full of competition, commodification is also challenging destination marketers. Only by means of creativity destinations can differentiate themselves from the many commodity destinations around the globe. One of the most obvious methods to reach that goal could possibly be the art of branding, which will be discussed later. Visitors nowadays also demand more sophisticated communication of holiday experiences, which could be accomplished via channels such as new destination management and marketing systems. In this regard, the cyberspace component with its virtual platforms and the internet plays an enormously important role. Finally, the authors discuss consolidation and collaboration. Consolidation like alliances, mergers and acquisitions in airlines, hotel chains and other fields of the tourism industry represent a big threat, which clearly needs to be defied by destinations by pooling resources in order to develop an integrated marketing mix. “To achieve such a goal, collaboration is not viewed as a luxury, but as a necessity for destinations to survive in the face of considerable competition and environmental challenges.” (Fyall & Leask, 2007, p. 61)

3.2 Destination branding

3.2.1 Branding in general

The concept of branding has been used extensively for products and services, however, in a tourism destination context it is still a relatively recent phenomenon. A brand can be defined as “[…] a name, term, design, symbol, or any other feature that identifies one seller’s good or service as distinct from those of other sellers. The legal term for brand is trademark. A brand may identify one item, a family of items, or all items of that seller. If used for the firm as a whole, the preferred term is trade name. A brand is a customer experience represented by a collection of images and ideas; often, it refers to a symbol such as a name, logo, slogan, and design scheme. Brand recognition and other reactions are created by the accumulation of experiences with the specific product or service, both directly relating to its use, and through the influence of advertising, design, and media commentary. […] A brand often includes an explicit logo, fonts, color[u] schemes, symbols, sound which may be developed to represent implicit values, ideas, and even personality.” (American Marketing Association, 2011)

Brands have become more and more important to organisations, because they have the potential to be, if managed properly, one of the few strategic assets to provide true competitive advantage. For organisations, brands play an important role in many ways. They brand their products because it is a way of adding value to them. Moreover, a brand represents some sort of identification and is a means of legally protecting their products’ and services’ unique aspects. Moreover, they provide a means for endowing the offered
products with unique associations and are a sign of a certain quality level. Consequently, brands can be a source of competitive advantage as well as of financial profits. For the consumers, on the other hand, a brand is primarily an identification of the source of the product, a symbolic device and a promise by the producer. In order to be successful, a brand must ensure that the consumers’ needs and the brand’s values and characteristics match each other, thus it must establish an emotional relationship with the consumer (Baker & Cameron, 2008, pp. 85-86). Hence, the aim of a brand is to create communication with consumers and eventually inspire trust, consistency and brand loyalty. This is done by promising certain features and above all consistent quality (Tasci & Kozak, 2006, p. 300).

Likewise, Pike (2004, p. 75) suggests that a brand can be seen from two different perspectives. When it comes to the producer’s angle, it is useful to think of a brand as representing an identity. For the consumer, then again, a brand is representing an image. As can be seen in the model, brand positioning can constitute the interface between the two. Through the development of a unique product or service personality or image, which ideally matches the consumer’s own personality, an emotional connection can be created.

![Figure 6. Brand identity, brand positioning and brand image](source: Pike, 2004, p. 75)

### 3.2.2 The meaning and advantages of destination branding

Like products, geographic locations can also be branded. The purpose of such branding is primarily to make people aware of the location. Consequently, desirable associations are linked in order to create a favourable image of the place to attract visitors and businesses (Baker & Cameron, 2008, pp. 86-87 cited following Keller, 2003, n.p.a.). The main difference between place brands and commercial brands is thereby the fact that places do not have a legal owner, but are rather “owned” by any organisation that wants to exploit the image of the place. Also, the possibilities of the creation of a brand name are rather limited and mostly it will be related to the destination or country name. The general definition of a brand, however, satisfies most of the aims of destination management and is therefore applicable to both contexts. Both image and branding have gained importance to destinations, mainly due to competition or substitutability issues. Blain, Levy, & Ritchie (2005, pp. 329-330) are aware of the concept of destination image and that image is not only the impression of individual destination attributes, but also the holistic impression of a place. Also, destination image is a significant factor when it comes to visitor choice.
Consequently, the authors are of the opinion that a definition of destination branding should incorporate the concepts of destination image, as well as that of competitiveness.

The destination itself can be considered as a brand made up of the image of the combined tourism goods, services and experiences available. Hence, one could say that all these elements are branded together under the name of the destination (Elbe, Hallén & Axelsson, 2009, p. 284 cited following Buhalis, 2000, p. 109). Considering the destination itself as a brand implies that all the actors delivering the various components are interdependent and so all they do in order to attract more tourists to their destination affects both their own individual brand image as well as the image of the overall destination (Elbe, Hallén & Axelsson, 2009, p. 284). From a consumer perspective, the destination-tourist products can be regarded as an integrated tourist experience, whereby the whole destination is considered to be the provider of the product, and not the individual actors. Therefore, in the marketing process, it makes sense to treat the destination as one single entity – a brand (Buhalis, 2000, p. 109).

Morgan and Pritchard (2004, p. 69) identify five successive phases in the process of destination brand building:

- Phase one: Market investigation, analysis and strategic recommendations
- Phase two: Brand identity development
- Phase three: Brand launch and introduction and communication
- Phase four: Brand implementation
- Phase five: Monitoring, evaluation and review

In the first stage, the current situation of the destination and its brand have to be investigated through extensive in-depth analysis and research. The relevance of the brand and its relative position compared to competitors have to be analysed. Once the market investigation is complete, the brand identity has to be developed. A meaningful distinction and brand promise are key to this stage, as they actually constitute the most essential part of the brand. Later, the brand is launched and communicated throughout various promotional channels and campaigns. Different marketing tools are used in order to send a consistent and convincing message that promotes the brand. After implementing the brand, the most essential step is the follow up. The brand’s effectiveness and performance in the marketplace are measured, evaluated and monitored. In that way, it is made sure that the brand personality is continuously evolved, enriched and possibly adjusted.

In order to be successful and create an emotional attachment, a destination brand has to feature certain characteristics. Ideally, it should be credible, deliverable, differentiating, conveying powerful ideas, enthusing for stakeholders as well as for partners, and it should be resonating with the consumers of the destination product. If the brand can comply with these conditions, consumers should perceive certain additional values and benefits from choosing that one brand over another, or over a non-branded product, service or experience. These benefits are reflected in brand equity, whereby the value of the brand is derived from different factors, namely brand awareness, perceived quality, associations and loyalty concerning that brand. However, brand equity it is very difficult to measure accurately (Baker & Cameron, 2008, pp. 84-85).

So, branding entails certain marketing advantages for DMOs and destinations, as well as for the potential consumers. Firstly, in a sector of complex and high involvement purchase
decisions, branding can reduce the number of choices available. Tourism is highly intangible and branding has the power to offset this effect. Moreover, and especially important in the field of tourism, which is usually very sensitive to variability of experience, a brand communicates consistency. Finally, brands can provide a focus for integrating producer effort and help and motivate people to work towards the same outcomes (Baker & Cameron, 2008, pp. 87-88). Hence, the need for branding of destinations and the importance of branding for tourism seems undisputable. Correspondingly, Morgan, Pritchard & Piggott (2002, p. 285) even argue that “branding is a powerful weapon in the marketing armoury of contemporary destination managers confronted by increasing competition, product parity and substitutability.”

3.2.3 Challenges for destination branding

When it comes to branding, most challenges faced by destination marketers are related to financial, political and environmental matters. Like it is the case for destination marketing in general, the limited budgets of DMOs poses one of the biggest problems. Innovative branding approaches, combined with the tactic of “outsmarting rather than outspending” could be a solution, but are tough to implement. Another issue is concerning the role of the local population in the branding process. Only if they are actively involved in branding and literally live the brand, the image consistency between brand and reality can be assured. Also, the already mentioned complexity of the tourism product, in combination with the differing requirements of the many stakeholders within the destination, are a threat for the success of destination branding (Baker & Cameron, 2008, pp. 88-90). Likewise, taking New Zealand as an example, Morgan, Pritchard and Piggott (2003, p. 287) state that the challenge of successful destination branding is related to managing the “realpolitik”, thus the political realism and practical policies, of distinct and sometimes incompatible national, regional and local interests. Hence, destination branding is not only a rational marketing activity, but a complex political undertaking which is deeply linked to issues such as local pride.

“[...] Despite today’s aggressive marketplace, the stock in trade of too much destination advertising remains blue seas, cloudless skies and endless golden beaches with a less than memorable tagline.” What Morgan, Pritchard and Piggott (2003, p. 286) want to highlight with this statement is, that in spite of the existing threats of substitutability and competition, most destinations are not very inventive when it comes to their destination promotion approaches. However, almost any destination around the world claims to have wonderful nature, spectacular scenery, nice local people, unique culture and impressive heritage. Therefore, what destinations should aim for is to rather focus on a clear and unique positioning by branding the destination experience rather than the physical attributes of the place. This is the only way to get the consumers’ attention and provide them with a more persuasive reason to choose a certain destination and visit it (Hudson & Ritchie, 2009, pp. 217-219).

Sometimes, the images people have of certain destinations are not actually an accurate portrayal of the place in the 21st century and of what the tourist destination has to offer now. Particularly places which have for a long time depended on old-fashioned or rural imagery but now want to modernise it are faced with this kind of problem. Such inconsistencies, however, can be resolved, harmonised and credibly communicated in a destination’s branding programme. Efficient branding thereby expertly manipulates the
existing clichés by giving greater complexity to the stereotypical identity. Besides, this method can also be useful for getting the public to support and live the brand, a method called internal branding (O’Leary & Deegan, 2003, pp. 220-222).

3.3 Integrating destination image and marketing

While for some researchers the importance of proper destination image development clearly relates to the overall success of a destination, some others, such as for example Baloglu and Cleary (1999), rather connect it specifically to its effects on marketing related variables.

3.3.1 The interrelationship between the two concepts

Generally, marketers’ strong interest in the concept of destination image is based on the simple fact that it relates to decision-making and consequently to profitable sales of tourist products and services. National tourist offices often study the images held by potential visitors and use the results for market segmentation, brand development and subsequent promotion campaigns. In most cases, the potential visitors have never been at the destination before they decide to purchase the travel product. Due to this intangibility, the marketing mix, and especially the pricing component, plays an important role when it comes to the image of a destination (Buhalís, 2000, p. 110). Imagery can also be used to increase past visitors’ remembered satisfaction with the place. In that case, the aim is to encourage repeat visits and purchases (Jenkins, 1999, p. 2). Therefore, as Sirakaya, Sonmez and Choi (2001, p. 126) propose, it is essential to know at what point images actually influence the consumer’s selection of a particular destination instead of another place. In fact, individuals are aware of a multitude of destinations and hence hold a unique image of each of them. As there is a huge number of destinations available, only successful marketing and branding can differentiate them from each other. Molina, Gómez and Martín-Consuegra (2010, p. 722) concentrate the immense significance of image for marketers in saying that it is one of the few instruments that can help differentiate a destination from its countless competitors in today’s increasingly competitive market.

Looking back on the exhaustive explanation of the process of image formation in chapter two of this thesis, it was highlighted that individuals can form images of a destination even without ever having been there, or also without having been exposed to any kind of commercial information about that place. In this context, Echtner and Ritchie (1991, p. 4) suggest that measuring and using these basic images would be very beneficial in designing marketing strategies. Along these lines, the strengths and weaknesses of the particular existing image could be addressed more effectively through an appropriate marketing strategy.

Consumers’ images are regarded as a fundamental part of the touristic product or brand and often even deemed to be the basic foundation for all forms of marketing activities (Prebensen, 2006, p. 747). The ultimate goal of destinations in conducting marketing is the attraction of tourists through influencing their decision-making and choice. Therefore, researchers are in consensus about the utmost importance of image for a destination’s success in tourism (Tasci & Gartner, 2007, p. 413). Considering this high significance of image for marketing reasons, destination marketers clearly need a better understanding of how images are formed. Only then, they can identify target groups and decide which image should be shown to which market segment. Especially motivation factors have to be
carefully studied, so that the most significant motivators can be incorporated in marketing communication. Destinations spend a considerable amount of money and time into the effort to create and boost a positive image. Focusing on the most essential destination attributes and tourists’ motivators would certainly result in a higher efficiency in advertising and promotion expenditures as well as a higher effectiveness in the ultimate goal of attracting tourists to a destination (Baloglu & McCleary, 1999, pp. 891-892). Since there are changes in destination image before and after visitation, it is desirable for marketing purposes to separate the images of those who have visited and those who have not yet been at the destination in question (Echtner & Ritchie, 1991, p. 4). In any case, even if a target group already has an image of a place, marketing is capable of reinforcing it.

Baker and Cameron (2008, p. 92) explain the difference between destination identity and image. The former is how a certain place wants to be perceived and a set of specific brand characteristics that destination marketers think would differentiate their destination from its competitors. Image, on the other hand, is the sum of impressions and beliefs that people have of a place. At this juncture, the purpose of marketing communication is to build a connection between destination identity and image.

3.3.2 The DMO’s role in conveying image

As already discussed earlier, DMOs have, to a certain degree, the power to influence the messages communicated to the target audience. However, they have only limited control over product development or related service delivery, which is usually under the responsibility of the many small independent tourism operators within the destination. This means, that when it comes to the development of destination brands, achieving clarity and consistency of image implies substantial challenges for DMOs. For that reason, what destination managers and marketers can do, in order to have some influence on the destination image they want to convey, is to put all their efforts into the communication of a suitable marketing mix (Hanlan & Kelly, 2005, p. 164).

As images play such an essential role in information processing and particularly in destination choice matters, tourism marketers want to strategically establish, reinforce and, if necessary, change the image of their destination. Yet, Chi & Qu (2008, p. 634) remind of the fact that not all elements contributing to the development of an image can be controlled. Tourism advertising and promotion is only one existing possibility for manipulation, pursuing the ultimate goal to match the promoted and the perceived image to the greatest extent possible. Through advertising, image becomes an artificially created differentiation, because it strongly influences and forms beliefs about the offered tourism products (MacKay & Fesenmaier, 1997, p. 540).

One possible way is introduced by Nickerson and Moisey (1999, pp. 222-225), who see the basis for image development and market positioning in the understanding of what features attract people to a destination. Accordingly, clusters are made, whereby the underlying images provide a means of recognition to each of the different groups. It is then the role of the marketing organisation to brand the destination through these icons.

Nevertheless, at this point one should put into question in how far it is worth the effort of trying to control image development, if word of mouth and personal experience are considered to be much more authentic and believable anyways. Of course, the main raison
d’être of marketing establishments is to promote and sell, but this can only be done successfully if these organisations are fully aware of the role image plays in that context. Obviously, the two aspects image and marketing stand in a reciprocal relationship. Still, it would be interesting to discover the influencing factors more precisely. Is it primarily the basic underlying image that affects which marketing activities are carried out, or is it marketing that manipulates the image?

3.3.3 The relation between image and branding

Blain, Levy and Ritchie (2005) carried out a study to get insights into destination branding practices and how the definition of branding is understood by tourism destination managers. Interestingly, the theme that was most put forward by the tourism professionals was related to the concept of image, often to the image that visitors themselves have of a destination. They opine that in the process of destination branding, destinations should define and create a particular image (the brand identity) they want to portray and then convey that image to the target markets (ibid., p. 335).

Based on the notion that especially in a tourism context there seems to be confusion between brand and image, Ekinci (2003, pp. 21-23) proposes a theory on how destination image and branding are interrelated. In his opinion, only branded destinations can manage to establish an emotional link with consumers and the process of destination branding begins, when there is a strong emotional attachment included in the evaluation of a destination image. Hence, branding is considered as the emotional component of the destination image. In order to be successful, destination branding should establish a close link between destination image and consumer self-image, and satisfy the consumer’s needs. Thereby, brands with an own personality, which can be compared to a human’s personality with traits like “friendly” or “exciting”, are considered to be doing especially well. Ekinci’s (2003) ideas are summarised in the following model. On the left side of the illustration one can see that destination branding is considered as a part of the destination image and encompasses brand personality. Moreover, the destination image is standing in a relationship with the tourists’ self image, meaning that the two images should be as similar as possible. This is achieved if the destination brand can satisfy the tourists’ basic and emotive needs.

![Figure 7. Destination image and tourist self-image](source: Ekinci, 2003, p. 21)
Another theory on the interrelationship between destination image and branding is put forward by Tasci and Kozak (2006, pp. 312-314). They hold that destination brand loyalty refers to the success of a destination in providing experiences that correspond to the visitors’ needs and matches the destination image they have. Destination image contributes to forming a destination brand and also to its success. Hence, as long as the destination image in the minds of visitors and potential visitors is a positive one, the brand will occupy a strong position and will be successful. Therefore, one can conclude that a brand is more than an image. Furthermore, as illustrated in Figure 8, branding involves two different images, the projected (supply-side) and the received (demand-side) image. The images perceived by the consumers might include the meanings and assets communicated by the destination, but also information about the destination from other independent sources such as general media. The fit between the two represents the commonalities between the projected and the received image. The size of the fit can thereby vary, revealing the success of the destination’s marketing activities. The model also shows the more concrete aspects of the destination brand, namely the logo, name and slogan used. These factors are easily noticeable and visible and are therefore situated in a common area between the two images. According to the knowledge gained in imagery literature, the perceived brand has an influence on consumer behavior. All these concepts, as well as their complex ramifications, contribute to the overall brand equity, which has been explained above.

![Figure 8. The link between destination brand and image](source: Tasci and Kozak, 2006, p. 313)

It is argued that a strong brand position requires the target market to have a focused and crisp idea of what the brand is standing for. Therefore, a small number of positive and meaningful image attributes have to be identified, on which the DMO decides to build on. A starting point for developing and keeping a strong brand image is the fundamental understanding of the tourists’ image of the destination (Prebensen 2007, p. 748). The marketing organisation should ideally also understand the brand positioning of the competing destinations, so the chosen attributes can provide a point of differentiation. The
findings from their study show the need for destination marketers to focus on a few key attributes, instead of trying to be everything to everyone. Obviously, if a destination cannot live up to the brand promise it has been delivering through marketing and promotion communication, there is a high risk for the brand message to be diluted (Hanlan & Kelly, 2005, p. 174-175).

To conclude the discussion on destination image and destination branding, a very recently published quote by Qu, Kim and Im (2011, p. 467) perhaps best summarises the complex interrelationship. “Brand image plays a significant role in building brand identity, whereas brand image is also a reflection of brand identity. That is, consumers build a destination image in their minds based on the brand identity projected by the destination marketers. Then, destination marketers establish and enhance brand identity based on their knowledge about consumer’s [sic!] brand image on the particular destination.”

3.4 “One size fits all” – does it really?

After having gained an insight into the topics of destination image and destination marketing and branding, several questions arise. First of all, the author questions whether marketing approaches should be changed for people with different images of a country as a destination? Even though many arguments are in favour of adapting marketing to the needs and wants of the particular target groups, this approach could be confusing and ineffective. The alternative would be to employ a “one-size-fits-all” approach in which the same image is communicated to all potential visitors. Anyhow, the discussion of the recent trend towards destination branding seems to suggest the second strategy, namely promoting the same image to everyone.

Then again, MacKay and Fesenmaier (2000, p. 417) follow Hofstede’s (1991) results and opine that although in marketing the communication of a consistent image may bring benefits, it is not advantageous across cultures. The use of standard symbols and images might have dissimilar connotations in different cultures and consequently lead to reduced or minimised marketing effectiveness. Obviously, culture defines people’s perceptions, impressions and interpretation. Cultural differences can provide accurate criteria for segmenting, targeting and positioning the market, wherefore they are considered to be very valuable constructs for international tourism promotion (MacKay & Fesenmaier, 1997, p. 540).

So, how do the two approaches of finding different target groups on the one hand and branding with one strong brand image on the other, fit together? Can a destination combine the two? For example, as will be discussed in the next chapter, Austria promotes a brand, Urlaub in Österreich (Vacation in Austria), but at the same time it follows slightly different marketing strategies in each of its target markets. In how far can a country, across different markets and cultures, achieve to develop a consistent, somewhat standardised, and yet realistic and adapted marketing strategy?

The following empirical part of this thesis takes Austria as a case study. An insight into the Austrian National Tourist Office’s marketing and branding practices, supported by first hand information from experts, will try to bring clarity to the arisen questions. The chapter will investigate how theory and the difficulties involved are put into practice at a real tourist destination.
PART C

EMPIRICAL FINDINGS
4  AUSTRIAN NATIONAL TOURIST OFFICE

4.1  Tourism in Austria and the responsible tourism organisation

Tourism in Austria is not a recent development, but can rather look back on a long history of hospitality. Since the 19th century, the Alpine Republic has been declared the favoured tourist destination by visitors from all over the world. Already back then, beginnings of organised tourism, in the fields of health tourism, city and culture tourism, events and exhibitions, as well as recreation in general, existed. However, the fall of the Danube Monarchy, the subsequent bad economic situation, political instability and finally the outbreak of World War II meant a sudden end to the Austrian tourism developments. During the inter-war period, the era of recovery brought a revival for tourism, which was, however, stopped again through the economical crisis and the beginning of World War II (Österreich Werbung, 2011a).

Although the Austrian National Tourist Office ANTO is not quite as old, the organisation has a long history, too. Right after the Second World War, tourism in Austria started to be successful again. During 1945/46, a division within the then so called Austrian National Travel Agency (Verkehrsbüro) was given the task to evaluate the condition of Austrian restaurants and hotel businesses, thus becoming a predecessor to the ANTO (Österreich Werbung, 2006). In 1955, the Austrian Tourist Office was founded as an association with the specific task of promoting Austria as a travel destination abroad. Around 20 years later, the promotion of domestic tourism was added to the organisation’s tasks. Formerly called “Österreichische Fremdenverkehrsverwaltung” (Austrian Tourism Advertisement), the association was renamed to its original German designation “Österreich Werbung”, literally meaning “Advertisement Austria”. The organisation’s English name Austrian National Tourist Office best describes its actual function as the country’s national tourism establishment. The association has several members and its budget is made up of membership fees from the Austrian federal government (75%), the Austrian chamber of commerce (25%), as well as the Austrian tourism industry’s contributions for marketing activities (Österreich Werbung, 2010a).

Nowadays, tourism plays a very critical role for the Austrian economy, making up for as much as 5.4% of the country’s gross domestic product (Statistik Austria, 2011). This high importance is also reflected in the findings of a recent study conducted by a local higher tourism education institution. Accordingly, one in five jobs in Austria is directly depending on the situation in tourism (Tourism-review, 2010).

Tourism exports amount to 1,674 € per capita of the resident population, placing Austria on rank three within the European Union, right after Cyprus and Malta. During the year 2010, an all-time record of 33.4 million tourist arrivals was recorded. Whereas 11.4 million of these arrivals were originating from within Austria, 22 million came from abroad. A total amount of 124.9 million overnight stays was documented, with an average length of stay of 3.7 nights, whereby foreign tourists tend to stay one night longer than domestic ones. While twenty years ago, summer tourism (60%) played a more important role than winter tourism (40%), the ration these days is equally balanced. Relating to tourist expenditures, the daily spending of tourists in Austria amounts to 109 € in summer and a clearly higher amount of 135 € during a typical day of a winter holiday (Österreich Werbung, 2011b).
4.2 Aims and tasks of the ANTO

As already briefly introduced above, the ANTO is Austrian National Tourism Organisation and as such it has certain tasks to fulfill. Even though their main tasks are marketing-related, DMO is today not only an acronym for destination marketing organisation, but includes destination management, too. According to Day, Skidmore and Koller (2002, p. 177), the core responsibility of DMOs, including national and state tourist offices, hence also the ANTO, is to position a destination’s image in the minds of a certain target group. DMOs are usually non-profit organisations and their main aim is to coordinate efforts in order to generate tourist visitation for a given area. Their key duties consist of the development of a unique destination image, the coordination of private and public tourism industry constituencies, the provision of visitor information, as well as the leadership of the total tourism industry at the destination (Gretzel et al., 2006, pp. 1-2). Thereby, DMOs are traditionally leading promotional campaigns and local tourism suppliers at the destination have the possibility to participate and contribute (Buhalis, 2000, p. 112).

All these aims and tasks certainly apply to the Austrian National Tourist Office. More specifically, the organisation states that its central objective is to assure, together with the Austrian tourism suppliers, the maintenance and the further development of Austria’s competitiveness as a destination. Therewith, the organisation can make a critical contribution to Austria’s market share in the international tourism industry. Correspondingly, the ANTO’s key assignment involves the following tasks:

- Operating and managing the brand Urlaub in Österreich (Vacation in Austria), which differentiates Austria from other destinations and communicates an emotional added value of a stay there.
- Investing in and cultivating the internationally most promising markets through innovative and up-to-date marketing.
- Acting as a partner of the Austrian tourism industry’s suppliers and as fundamental node within the industry. By this means, the Austrian tourism industry can profit from the ANTO’s always informed and updated knowledge about guests and markets.

The ANTO carries out a yearly total of more than 1,500 marketing activities on a global basis, reaching from classical destination advertising, over the organisation of trade fairs and sales platforms, to training for the travel agency and tour operator industry. Additionally, it offers individually adapted marketing activities for Austrian tourism suppliers, who decide to specialise on the respective market opportunities and requirements (Österreich Werbung, 2010a, p. 4).

4.2.1 Vision

The vision shows into which direction the organisation wants to head in the future and where it sees itself in the year 2020: With its passionate creative will and its creative competences, the Austrian National Tourist Office is among the world’s leading tourism organisations (ibid., p. 5).
4.2.2 Mission

The company’s mission is “Wir begeistern für Österreich” (We enthuse for Austria), and demonstrates the organisation’s precise assignments, as they have partly already been introduced above (Österreich Werbung, 2010a, p. 5).

- The ANTO operates the brand *Urlaub in Österreich* and creates desire for inspiration and personal development.
- The ANTO possesses a profound knowledge of the destination’s tourism offers as well as of the developments of all source markets. Hence, it can systematically identify and cultivate the internationally most promising markets for the destination Austria.
- The ANTO acts as an important mediator within the tourism system and assures productive collaboration as well as the best exploitation of synergy potentials in the Austrian tourism industry.
- The ANTO considers itself as a learning organisation and assures a decision-oriented approach of handling its knowledge as well as a future-oriented development of new and competitive competences.

4.3 Cultivated markets

Currently, in 2011, the Austrian National Tourist Office concentrates on three main markets corresponding to the geographical areas Western Europe, Central and Eastern Europe CEE and overseas, which it has decided to invest in and cultivate. These markets, where the ANTO is also represented with a total of 30 own offices, cover around 95% of all overnight stays and have the greatest potential for Austrian tourism. Figure 9 below shows a map with all the ANTO offices around the globe (Österreich Werbung, 2011c).

![Figure 9. Overview of the ANTO’s markets](image)

The regional arrangements are based on intense strategic considerations, which are founded on numerous parameters. Amongst others, the choice of markets depends on their individual potential. This can be determined by means of indices such as the Global...
Market Performance Index GMPI, which analyses various countries and calculates key performance figures, indicating how much potential a market will have in the future regarding mainly economical issues and among others also tourism (Tauschmann, 2011a, p. 6).

Some countries are united as one single market, as is for example the case for Great Britain, Denmark and Sweden. These three countries were merged on the one hand because of geographical reasons, building the region Northern Europe, and for budgetary motives, on the other. Here, the question arises why other Northern countries such as Finland and Norway are not included and the reason, again, are matters of potential. The market manager of the Swedish office in Stockholm explained that for years, Norway and Finland were included as well, although without their own offices, they were handled by the offices in Sweden and Denmark. However, in-depth studies revealed that considering the provided budget, the ANTO should rather focus on the two countries that show the most potential, namely Sweden and Denmark. Also in a population context, Norway and Finland are too small and do not show enough potential for intensive market development by the ANTO. The reasons for the fact that Sweden and the United Kingdom build one single market are one the one hand geographical ones, as Great Britain is considered to be a part of Northern Europe. On the other hand, the explanation for the current market cultivation can be found in the intention to pool resources. So, different departments support each other across offices and countries. Some countries, such as Sweden and Denmark even have common marketing campaigns, which are sold to the Austrian partners as one single item (Tauschmann, 2011a, p. 3).

In all other markets, which are not currently worked on, the ANTO acts as the first contact for any form of tourism-related projects. In case the tourism industry in one of these countries expresses their interest, the ANTO examines the project concept and, if it is appropriate, starts to implement specific marketing activities. Here, the ANTO collaborates with its partners as a competent and experienced service provider (Österreich Werbung, 2011c).

### 4.4 Tourism research activities

The Austrian National Tourist Office continuously develops new instruments and methods for assuring and extending its market and customer knowledge based on professional market research.

One of the main research projects is the so-called T-MONA (Tourismus Monitor Austria), which is about carrying out guest surveys during the visitors’ stay in Austria. Moreover, country specific studies are conducted, measuring the travelling population’s behaviour, interests and the image of Austria within certain markets or countries. The market research department furthermore engages in general as well as tourism related trend screening, statistics about tourism in Austria, tourism in Europe and world tourism, qualitative studies, customer surveys, tests on advertising material, inquiries about the brand and the image, as well as research concerning target groups (Michenthaler, 2011, p.1). The image of Austria as a tourist destination, the ANTO’s brand and the respective target group will be discussed in detail in later dedicated own sub-chapters.
4.5 Image-related studies and Austria’s destination image

As it was outlined before in the theoretical part, images form the basis of the evaluation and selection process and hence provide the link between motivations and destination selection (O’Leary & Deegan, 2003, p. 214). This means that image studies are a prerequisite to a successful overall marketing strategy. As an experienced and professional DMO, the Austrian National Tourist Office is well aware of that matter of fact and accordingly carries out several image-related research activities.

4.5.1 Country-specific studies

In the country specific studies, for instance, one third of the investigation is dedicated to an image part. Thereby, the destination image is tried to be analysed on the one hand through open questions, such as asking the respondents about their spontaneous associations about the holiday destination Austria. On the other hand, closed surveys aim to inquire the features and characteristics of the destination, as well as the suitability for certain forms of vacation and length of stay. Also, the knowledge about the destination is recorded, for example, which regions or federal states the respondent knows about or has already heard of. When it comes to the selection of Austria as a destination, the survey includes questions about the most important choice criteria, which allows a subsequent analysis of strengths and weaknesses. The covered issues concern topics like weather, landscape, traffic, price, accommodation and sociability, but also touristic offers are considered (Michenthaler, 2011, p. 2).

Here, a comparison between people who actually do spend a vacation in Austria and those who do not is interesting, because it reveals unknown strengths and weaknesses of certain aspects. Consumer studies should not only identify the images people have of a destination when they have already been there, but also which images most likely stimulate potential travel to the destination. Also the “I don’t know”-component can give hints about which offers are not well enough known by the market yet (ibid.).

The ANTO differentiates these images by studying both populations. On the one hand, the individual country’s international travellers in general, who have spent a holiday abroad during the last three years, or are going to do so in the three years to follow, are approached. On the other hand, and more specifically, people having an expressed interest in the destination Austria are chosen as interview partners. To be considered interested, these people have been on a vacation in Austria within the last three years and/ or plan it within the next three years (Österreich Werbung, 2011d, p. 1). By differentiating these images, the ANTO’s research approaches are according to the theory on primary and secondary image, and pre- and post-visit image respectively, which have been discussed in part B of this thesis.

When asking the ANTO project manager for market studies, whether it is possible to describe the general image of Austria as a tourist destination, the answer was that there are only few criteria and characteristics which are related to Austria by all countries. Certainly, there are strong variations in different countries, as the image of Austria strongly depends on a market’s knowledge about the country and this market’s general travel interests and behaviour. Relating to spontaneous associations when thinking of the destination, Austria stands for mountains, beautiful landscapes and winter sports in all surveyed countries, and in almost all of them Vienna can be found among the top five associations. In addition to
these top associations, each country holds its own individual associations relating to Austria.

When it comes to the suitability for certain types of holidays, the different markets’ opinions converge and Austria is above all considered a destination for winter sports and hiking holidays. Concerning characteristics and features of Austria as a destination, the country viewed as a cultivated and neat destination in all countries. Even though there is no real consensus on the other characteristics, hospitable and welcoming are associated quite often. Interestingly, the country’s show more agreement when it comes to the attributes which do not apply to Austria. Thus, the destination is not considered to be boring, overcrowded, noisy or ordinary by any of the countries, however, it is not unique or exceptional either. More detailed information on the individual markets’ image of Austria can be found in the appendix (Michenthaler, 2011, pp. 2-3).

4.5.2 T-MONA studies

According to an ANTO responsible for tourism research (Lastuvka, 2011, n.p.a.), another source revealing interesting results about destination image is the T-MONA study. This is a guest survey project carried out by the ANTO in collaboration with the responsible Austrian ministry, the chamber of commerce, a specialised market research company and the federal states’ tourism organisations and has been conducted since 2004 in a two-year cycle. It aims to investigate about guest typology, information seeking behaviour, realisation of the journey, the actual holiday stay, expenditure per person and day, general satisfaction and image, hence finding an answer to the question how the visitor’s are experiencing their holiday at the destination Austria. Since its first implementation, more than 63,000 face-to-face interviews have been collected, making T-MONA one of Europe’s largest and most effective guest surveys (Österreich Werbung, 2011e).

In comparison to the above discussed country-specific studies, T-MONA examines the destination image of people currently staying at the destination. Thereby, in order to be representative, the survey population is deliberately composed of the countries responsible for the majority of arrivals and overnight stays. For the last study in 2008/2009 these were Germany, Austria itself, the Netherlands, the United Kingdom, Italy, Switzerland, Czech Republic, Hungary, Romania, Denmark and the United States. Furthermore, interviews with visitors from France, Belgium, Russia, Japan and Spain were conducted on a regional basis (T-MONA, 2009a, p. 4).

The two charts on the next page show the most important characteristics of the destination Austria according to the survey participants of the T-MONA studies in summer 2008 and winter 2008/2009. As can be seen, the results were very similar during both seasons. According to these results, Austria has a very strong image of being hospitable and friendly. Even though the study was only carried out with a population from certain source markets, the outcome is highly significant, as the survey participants were representing the most important markets for Austrian tourism in terms of arrivals and overnight stays.

However, what has to be considered is that it is not clear whether the according questions were open or closed ones. If these characteristics were pre-defined, that could have possibly led to biased answers and limitations concerning free associations.
As learned in the theory part, the identity of a destination’s image is often considered to be a composite of various attributes. When observing the above results, it is noticeable that the T-MONA study measured such attribute-based images. Rather than asking the respondents for their holistic image of Austria, for example whether they have a mainly positive or negative image of the destination, it was chosen to investigate a variety of characteristics describing the destination. However, the charts do not clearly show if the attributes were ordered according to their functional and psychological nature or not. According to Echtner and Ritchie’s (1991) model, hospitable, friendly, safety and high quality would certainly be located at the psychological end, while sporty, for instance, is a clearly functional characteristic.
4.6 The brand “Urlaub in Österreich”

Since 2007, the ANTO has been working with its brand *Urlaub in Österreich*, which literally translated means “vacation in Austria”. During a process of brand consolidation a few years ago, it had become clear that the communicated brand has to comply with the new requirements of the relevant target group, namely a strong desire for new experiences and self-realisation through independent activity and the extension of the known horizons. The ANTO’s response to these challenges was the new core of the brand “inspiring recreation”, a promise to arriving in Austria and coming alive there. Hence, holidays in Austria provide mental as well as physical growth, self-discovery and expand people’s personal ability to take on new challenges (Österreich Werbung, 2008a, pp. 6-7).

4.6.1 Sub-stories

As learned in the theoretical part about branding, a brand has to be based on the strengths of a destination. The ANTO takes Austria’s assets as a basis for the brand’s three sub-stories, communicating what makes a vacation in Austria so unique.

- Sub-story 1: A country, which unfolds as the cultural heart of Central Europe
- Sub-story 2: A country, which understands how to live (savoir-vivre)
- Sub-story 3: Hosts, who are committed to the holiday fortune

As the target group, which will be presented later on, does not only expect recreation but is also culturally interested, the cultural aspect is an important part of the brand. Austria is a country in between tradition and innovation and is, amongst others through its geographical location, influenced by many different cultures. Classical music strongly defines Austria’s image, and more recently also culinary aspects are communicated. Even if Austria will always be an interesting destination for culture-interested travelers, it has to make sure it also develops as modern, vibrating and attractive destination (Österreich Werbung, 2008a, pp. 9-11).

Holiday means distance from everyday life, change of atmosphere, immersion in a different world, exciting self-discovery, delicious sensual life at self-determined pace, freedom, but also the opportunity to discover something new, to grow, to meet nice people and to be pampered. Instinctively, tourists choose holiday destinations where people are living a good life. In other words, even a country of rich culture can only become an ideal holiday destination if it understands to live itself, hence if it has so-called savoir vivre. Austria, as a country that knows how to live, inspires longing for a better life, for a relaxing and serene atmosphere where one feels accepted and where it is likely to find one’s holiday fortune. The positioning of Austria as such country is the aim of the second brand sub-story (ibid., pp. 12-13).

The third sub-story is about the relationship between guests and the host community. Many guest surveys reveal that Austrian hosts understand very well how to meet the needs of their guests and are often awarded above-average friendliness, charm and warmth. The basis for an unusual form of encounters between tourists and hosts and the getting to know and trust each other seems unique for a vacation in Austria. Attention and empathy, coupled with the charm and humor cultivated over centuries, gives the relationship of the Austrians to their guests a special touch. These high-quality personal encounters are among
Austria’s most important strengths as a tourist destination (Österreich Werbung, 2008a, pp. 14-15).

The organisation’s brand manager alleges that these communicated sub-stories are believable, emotionally rewarding and attractive, which combines them to a strong and meaningful brand (Scheuch, 2011, pp. 1-2).

4.6.2 Fields of fascination

The aim of the brand Urlaub in Österreich is to enthuse people about the destination Austria. By means of the new brand essence “inspirational recreation”, the brand will convince and captivate the more and more demanding target group, which is characterised by a lot of vacation experience, competence and expertise. Austria can best fascinate its guests in those areas where it has very good skills and talents and can combine them to tourism-related fields of expertise. These areas, where Austria can score higher than its competitors, are referred to as the brand’s “fields of fascination”. These areas are particularly essential for the development of appropriate touristic offers and represent historically developed strong points of Austrian tourism on the one hand, and new combinations of traditional talents, on the other. The ANTO has elaborated on five different “fields of fascination” (Österreich Werbung, 2008a, pp. 20-29).

- Fascinating encounters
- Fascinating regeneration
- Fascinating culture
- Fascinating culinary cuisine
- Fascinating nature

Generally seen, the brand that wants to be communicated by the ANTO quite well matches the image people already have of the destination Austria (Tauschmann, 2011a, p. 5). However, at the same time the country still has an image of being very traditional, if not even old-fashioned. Therefore, the ANTO has decided that the brand Urlaub in Österreich has to leave behind this harmonious, peaceful, homey and comfortable tranquility and instead become more provoking, exciting, exhilarating, activating and thrilling. But how can a DMO achieve that? This issue also leads to the question whether branding should be based on the already existing image of a destination, or whether the image can be influenced and changed through the strategic application of brands. According to the ANTO’s brand manager, it depends on the status quo of the image. If the image complies with the existing strengths, the DMO can strategically build on it and develop the brand accordingly. However, if it does not comply with the strengths and products, an image change would be desirable. Such a planned change of image can only be achieved through a long-term marketing and branding strategy, such as the ANTO has published in its brand manual (Scheuch, 2011, pp. 2-3).

4.6.3 From brand concept to brand experience

The previous two sub-chapters were an introduction to the brand’s theoretical fundament. Now it will be presented how a brand experience can be generated from this basic brand concept. The graph on the next page clarifies the process from concept to experience. The starting point for brand management is the underlying brand essence of Urlaub in Österreich, Austria – the inspirational recreation. By means of sub-stories and codes,
which have been elaborated according to the target group and take shape through the various carriers of meaning, the brand essence meets the prospective target group at the brand contact points. Through these brand contact points, for example offered tourism products, shown images, the corporate language or public appearances, the observers and visitors find the individual benefit they can get out of a vacation in Austria (Österreich Werbung, 2008a, p. 37).

<table>
<thead>
<tr>
<th>Brand essence and sub-stories</th>
<th>Codes</th>
<th>Carriers of meaning</th>
<th>Brand contact points</th>
<th>Individual benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria, the inspirational recreation…</td>
<td>A Central European cultural area affected by the Alps</td>
<td>Central idea of communication</td>
<td>Best-of-products</td>
<td>Inspiration, enjoyment and change with the guarantee of being able to letting go and feeling good and accepted</td>
</tr>
<tr>
<td>…as cultural heart of Central Europe</td>
<td>Exciting combination of tradition and innovation</td>
<td>Language and stories</td>
<td>Imagery &amp; corporate language</td>
<td></td>
</tr>
<tr>
<td>…as country that understands to live</td>
<td>Stimulating mixture of culture and nature</td>
<td>Symbols</td>
<td>Public appearances</td>
<td></td>
</tr>
<tr>
<td>…with professional commitment to the holiday fortune</td>
<td>Cosmopolitanism with cultural pluralism</td>
<td>Sensory</td>
<td>E-marketing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>…related to the trendsetters and opinion leaders</td>
<td>…offered best-of-products can become carriers of meaning, too</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 2. From brand concept to brand experience

Trustworthy touristic brands are based on the “DNA” of the region and ideally a destination brand focuses on the same strengths over a long period of time, in order to communicate consistency and stability. Even though in 2007, the Austrian National Tourist Office underwent a process of brand consolidation, the brand’s actual content does not change much. However, what has changed concerning the ANTO’s branding is the external appearance. The campaigns have since 1955 consistently been redefined and enhanced and will continue to do so because aesthetics, style and language are changing and a brand cannot ignore current trends (Scheuch, 2011, p. 2).
Brands communicate their messages with the help of stories and language, symbols and sensory means. Above this medium stands the central idea of communication, transporting the emotional messages, which should have an impact on the purchase decision. In the case of the ANTO’s recent branding campaign, the “inspirational recreation” is communicated by showing and dramatising Austria’s unique diversity. Thereby, vacation possibilities are staged in such way, that they can only be attributed to the country of Austria. These images show how unique and irreplaceable the products are and consequently evoke the recognition effect “It’s got to be Austria!” (Österreich Werbung, 2008a, pp. 39-41). Each message shows a special moment in Austria and underlines its inimitability, supported by the below shown bookmark, which is the recent campaign’s most important element and acts as consignor on each marketing sujet (ibid., p. 48).

![Bookmark “It’s got to be Austria”](image)

**Figure 12. Bookmark “It's got to be Austria”**
Source: Österreich Werbung, 2008a, p. 49

This marketing approach through typical Austrian images is a good example of how a DMO wants to convey a certain image of a destination, which is ideally matching the image people already have. The ANTO has done image research and wants its target group to immediately recognise the destination. In order to give the reader a better understanding of what these images look like, there are a few examples attached in the appendix. The examples show typical Austrian landscapes and authentic people enjoying themselves. The bookmark slogan is in English, however, it does exist in all individual markets’ languages.

### 4.7 Transnational target group

According to its brand manager, an internationally operating business like the ANTO needs global strategic planning, including a transnational definition of its target group. The most important issue is to develop a consistent, somewhat standardised, and yet realistic marketing strategy across different markets and cultures (Scheuch, 2011, p. 1).
The foundation for that is composed by the reports of the German milieu and trend research institute Sinus Sociovision, which is an expert in psychological and socio-scientific research and consulting and engages in research concerning the everyday lives of people, socio-cultural changes, the condition of society and the application of sinus research in connection with trends, target groups, and brands (Sinus Sociovision, 2011).

Across Europe there are common milieu patterns relating to value orientations, lifestyles and consumption priorities. Sinus Sociovision describes in detail eight important cross-country living environment segments, the so-called “Sinus-Meta-Milieus”. Thereby, groups of people who show similarities concerning their view of life and way of living are clustered. In that way, the analysis of a target group does not only involve basic value orientations, but also people’s everyday attitude towards work, family, leisure, money and consumption. By not only analysing demographic and sociographic, but also psychographic characteristics, this kind of study provides marketing with better and more detailed information than traditional approaches to target group analysis. The realised tests revealed that the brand Urlaub in Österreich is especially favoured by the bourgeois middle class milieu and its decision makers and trend setters, the established and the postmaterialists. The established are shaped by their success-driven ethics, feasibility thinking and strong exclusivity claims. Their way of life and holiday-making is established and characterised by strong cultural interests and a sense of style. They appreciate the skilful combination of tradition and innovation, and at the same time desire simplicity and tranquility. The milieu of the post-materialists is characterised by a culturally liberal attitude and open-mindedness, combined with a high degree of individuality and self-actualisation-needs. Post-materialists are environmentally and socially engaged and express a critical opinion concerning consumption. Their vacation-related orientation is characterised by time sovereignty, relaxation, the striving for balance and for original holiday experiences with authentic encounters. Accordingly, during the process of brand consolidation, the ANTO newly defined its target group by combining these two milieus and now identifies the so-called “established postmaterialists” as the target group for its brand (Österreich Werbung, 2008a, pp. 17-18).

The target group’s social situation looks like following: their average age is between 35 and 65, they are mostly married and living in a three- or multi-person household either with children or being empty nesters, meaning that their children have already grown up and have left home. The target group is furthermore characterised by having an above-average education and belonging to higher income groups, often with double-income. Concerning their values and life-style, these people are very self-confident, have a strong aspiration for self-actualisation and are willing to take responsibility. They know the “art of living”, enjoy subtle pleasures, aesthetics, education and culture, and do not want mass taste or mass consumption. Moreover, they strongly strive for balance between body, mind and soul, are open and tolerant and have a global horizon. The intensive participation in social and cultural life is another characteristic. When it comes to the target group’s travel- and vacation-related characteristics, they can be described by a high intensity of travel, often being on holidays twice a year. They mainly spend holiday-, short- and city-trips, or travel for wellness or business (Österreich Werbung, 2008a, p. 19).

So, as a result of the Sinus-Meta-Milieus study, the group of established post-materialists was developed as target group for the brand Urlaub in Österreich. Behind this cross-national target group are standing the segments of the individual countries’ modern
oriented upper class. In other words, even though that cluster was defined as the target group for all markets, it is necessary to study in detail in how far this group is developed in each individual market, and what its peculiarities are there. Generally, in Western Europe this target group is very similar, however, with different characteristics. The market manager of Sweden gave an insight into how the specific features of the established post-materialists in each market can be found out. In Sweden, for example, the ANTO employees try to get in touch with the target group by approaching people in their private circle of friends or by talking to journalists who write for the targeted media. Moreover, there are co-operations with local institutions. In the case of the Swedish market, the ANTO cooperated with an institution carrying out media analyses by giving them a briefing on the defined transnational target market and in exchange getting an analysis of this target group for Sweden specifically, which media the Swedish target group follows and other details which are useful for better communication (Tauschmann, 2011a, p. 3).

4.8 Market Sweden

4.8.1 Importance for Austrian tourism

Generally seen, the Swedes like to go on holidays abroad, with 81% of the total population of around nine million people having spent a holiday outside their own country within the last three years or planning to do so in the years to come. Since 2000, there has been an increase of 17.5% in Swedish holiday stays abroad. The country study about Sweden, which the ANTO conducted during 2008 and 2009, reveals that 8% of the Swedish tourists visited Austria during the last three years, making the Austria rank 13 among the Swedes’ favourite tourist destinations. The Swedish market shows a lot of potential for Austrian tourism, more precisely a number of 1.3 million potential incoming tourists, with 9% of all Swedes having concrete holiday plans to go to Austria (Gassner, 2008, p. 6).

Alpine destinations are very popular with the Swedes, in fact their interest in mountainous regions in the heart of Europe is twice to threefold as strong as the average Western European tourists’. When Swedes think about a holiday in the Alps, Austria is far ahead its direct Alpine competitors France, Switzerland, South Tyrol and Bavaria. 2.5 million Swedes, hence around 30% of the country’s total population, can imagine spending a vacation in Austria (ibid., pp. 6-7).

For the strategic reasons mentioned above, the ANTO decided to merge the regions Great Britain, Denmark and Sweden as one market. These regions are considered a typical source market for winter sports holidays, for which Austria has an excellent image and a very good market positioning. Austria’s potential for summer holidays, however, is still very big and not yet fully exploited (Österreich Werbung, 2010b, p. 13).

When it comes to Swedish overnight stays in Austria, 60% are recorded in winter and 40% in summer. However, when it comes to arrivals, there is a clear 50/50 balance between winter and summer. The reason for more overnight stays in winter is the fact that tourists stay longer at the destination for skiing than for any other type of holiday. Concerning this winter sport, Austria has a very good reputation among the Swedes. It is ranked on place one, even before France and Switzerland, however, there is a strong competition from their own Swedish skiing resorts (Tauschmann, 2011a, p. 3).
4.8.2 The Swedish ANTO office

The Austrian National Tourist Office in Stockholm has been in existence since 1950. In between, it was closed for a few years, but it re-opened in 2007. Mr. Michael Tauschmann is the current market manager for Sweden, sharing his tasks with a second employee. As market manager, he has a large variety of tasks, at the one hand being responsible for employee leadership, personnel management, but also for strategies and goals, marketing planning, budgeting, controlling, as well as for the conception and implementation of all marketing activities. In comparison to other ANTO market managers, who usually have the support of more employees, the responsible for Sweden also has strong operational field of responsibility, like public relations with the Swedish media or key account management, hence acquiring local tourism partners at the destination Austria. Obviously, the Swedish office works in close cooperation with the ANTO headquarters in Vienna, and also with its colleagues in London and Copenhagen. The fields of cooperation with Vienna are mainly e-marketing and brand management. The IMM International Market Management is thereby the central institution coordinating all market offices around the world. Guidelines and instructions from the headquarters include strategic plans, as well as plans concerning the budget or the brand. Moreover, each market gets certain guidelines about how to structure its campaigns. Usually, a general ANTO strategy is formulated, including strategic market goals. However, each market has its own market strategy and accordingly, each office has its individually adapted market concepts and marketing plans. These incorporate operative targets, campaigns and the marketing mix. As each market has its particularities, it is important to adapt the marketing campaigns to the Swedish target group, in order to meet their individual needs and wants (Tauschmann, 2011a, pp.1-2).

With only two employees, the Stockholm office is rather short-staffed. However, the Global Market Performance Indicator GMPI indicates that the market Sweden will have an enormous potential in the future and that the Swedes will have more income available for travelling during the following years. The ANTO has realised the growing importance of Sweden also for Austrian tourism and will allocate more resources to the Stockholm office. For 2012, the office gets a higher marketing budget, and there is hope for a personnel-related build up in the near future, too. In other words, there is definitely still a high potential to be exploited (ibid., p. 6).

4.8.3 The particularities of the Swedish market

As already outlined above, the “established postmaterialists” have been identified as the target group for all markets, including Sweden. Hence, the above outlined characteristics of the target group also apply for the Swedish established postmaterialists. However, it is of course necessary to study in detail the Swedish individualities of this group. This is done on the one hand by means of market studies, in cooperation with Swedish research institutes, on the other hand by applying more “casual” methods like trying to get to know individual Swede’s preferences and images through investigating in the ANTO employee’s private circle of friends, or collecting impressions through talking to Swedish journalists and travel institutions (ibid., p. 3).

When Swedish people go on holidays, they have two main requirements. On the one hand, they want to relax, enjoy and recharge their batteries, but on the other hand they also look for new experiences, challenges and the extraordinary. In comparison to other Western European guests, the expression of these motives among the Swedes is very strong, in
other words, for them, a holiday at the destination Austria must be a very successful combination covering the whole range of requirements. As it is the case with most guests, there is not one particular decision criterion for their destination choice, but rather a wide variety (Österreich Werbung, 2008b, pp. 2-3).

The Swedes are characterised by their strong desire for nature- and ecology-related experiences, as well as an above-average interest in culture and arts. Studies and market analyses carried out by the ANTO show that appropriate tourism offers including these aspects can signify an important potential for the exploitation of Swedish market share, especially for summer tourism (Tauschmann, 2011b, p. 3).

“Lagom” is the Swedish expression for “moderation” or “just right” and is the characteristic which best describes the Swedish lifestyle, portraying the country’s nationality to the point. This moderation can also be noticed when it comes to their expectations concerning holidays. The expressed need for moderation is related to the intensity of use of the variety of offered tourism products. Hence, a good and unforgettable mix between joyful relaxation and challenging new experiences is a must when wanting to satisfy the Swedish target group (ibid.).

In order to being able to provide the Swedish guests what they expect, the ANTO office in Stockholm has compiled a product guide for the Austrian tourism suppliers and partners. This guide is based on extensive market research and presents the ANTO’s campaign for the Swedish market, including a detailed explanation of the specifics and potential of this market, the target group, as well as examples of appropriate and success-promising tourism products.

4.8.4 Austria’s image in Sweden

The ANTO’s image-related studies show that, as in all other markets, Austria above all stands for mountains, beautiful landscapes and winter sports. Concerning the spontaneous associations coming to mind, the Swedes particularly think of the Austrian food, beer and wine, but also about culture, music and dance. The destination is known as being hospitable and welcoming. Austria is moreover considered a perfect destination for city trips. Swedes also have a certain image of Austria as being a very traditional country. The destination is not viewed as being cheap, however, the price-performance-ratio is rated very good (Michenthaler, 2011, pp. 2-3).

The market manager for Sweden states that Austria’s image among the Swedes is best in winter, concerning hospitality and culture, but also when it comes to winter sports infrastructure. On the one hand, Austria’s traditional values are contributing to its positive cultural image, however, this traditionalism easily leads to an image which is somehow old-fashioned or even conservative. However, as this image is outmoded and does not represent what the destination Austria really has to offer, the ANTO has decided to lead into a different direction. Austria should be communicated as a vivid and thrilling destination. This is done by adding new aspects into the marketing and branding campaigns, namely a combination of “design, wine and lifestyle” (Tauschmann, 2011a, p. 5). This approach is well adapted to the performed country-specific study which showed that the Swedes are associating Austria with food and wine. The fact that the promoted and the perceived image are already matching is a very good precondition for the ANTO’s future marketing and branding activities.
5 DISCUSSION & CONCLUSION

5.1 Knowledge contribution

This paper has investigated the effects of destination image on the marketing and branding of tourist destinations. Even though many researchers have dealt with those topics before, this dissertation can make a contribution to the existing knowledge by considering the concepts from a new perspective. On the one hand this was achieved by compiling a detailed theoretical framework, using numerous theories and models and bringing them together in a new form. On the other hand, the analysis of a case study was based on these theoretic findings in a way that no other author has performed or published so far. The case of the Austrian National Tourist Office provided an example which made it possible to explore the researched topic in a practical context, and to put the findings from literature into another perspective. The results from both the literature review as well as the in-depth interviews will now be critically discussed and used to answer the research questions defined at the beginning of the dissertation.

5.2 Answers to the research questions

The thesis’ first underlying research question was: How are the concepts of destination image and destination marketing and branding interrelated? It can be said without doubt that these concepts are strongly interrelated, and after a thorough examination of both concepts in the theoretical part, it was possible to identify the main correlations. Destination image studies are thus considered to be the foundation of successful destination marketing strategies. Marketers’ strong interest in the concept of destination image is mainly due to the fact that a positive image of a destination can be positively related to consumers’ choice for that destination, resulting in profitable sales. Therefore, national tourist offices and other DMOs often study the images held by potential visitors and use the results for market segmentation, brand development and subsequent promotion campaigns (Buhalis, 2000, p. 110). It was shown that in times of ever-increasing competitiveness, image is one of the few points of possible differentiation from other destinations.

The findings suggest that most tourist destinations spend a considerable amount of time and money creating and boosting a positive image. Carrying out image studies and focusing on the most essential destination attributes and tourists’ motivators would certainly result in a higher efficiency in marketing expenditures as well as a higher effectiveness in the ultimate goal of attracting tourists to a destination (Baloglu & McCleary, 1999, pp. 891-892).

When it comes to the link between image and branding, it must be emphasised that consumers’ images are regarded as an essential part of the touristic brand and often even deemed to be the basic foundation for all forms of marketing activities (Prebensen, 2006, p. 747). Thereby, the success of a brand is the bigger, the bigger the fit between the projected image communicated by the DMO and the image perceived by the consumers. These findings from literature are also confirmed by the ANTO’s brand manager, who considers a positive image as a foundation on which marketing communication can be built on. Hence, if an image complies with the existing strengths of a destination, a DMO can strategically build on it. According to his point of view, the image of a destination has
developed in the past and reaches into the present, whereas destination branding is directed into the future and is about which pictures or feelings a brand should evoke within the target audience (Scheuch, 2011, p. 3). So, even if the target market has already got a certain destination image from different information sources, brands can help marketers to reinforce that image.

Relating to the second research question *In how far can a DMO, across different markets and cultures, achieve to develop a marketing strategy that is consistent and somewhat standardised, and yet adapted to the individual market?*, the findings from literature and the case study lead to similar conclusions.

Authors like MacKay and Fesenmaier (2000, pp 417-422) are certain that attributes contributing to image perception may vary across countries of origin. Multinational tourism research as preparation for developing appropriate marketing strategies should therefore also involve tourists’ origins and the corresponding dimensions for image evaluation. However, although in marketing the communication of a uniform image might bring benefits, it is not really advantageous and not advisable to implement across cultures. Obviously, culture defines people’s perceptions, impressions and interpretation, hence the use of standard symbols and images in marketing messages might have dissimilar connotations in different cultures and consequently lead to reduced or minimised marketing effectiveness. Cultural differences can provide accurate criteria for segmenting, targeting and positioning the market, wherefore they are considered to be very valuable constructs for international tourism marketing and promotion (ibid., 1997, p. 540).

Whereas the above findings only make aware of the theoretical necessity for culturally differing marketing approaches, the Austrian National Tourist Office case study actually reveals very useful approaches that have already been applied in practice. As was stated by an ANTO expert, it must be emphasised that an internationally operating DMO needs global strategic planning, including a transnational definition of its target group (Scheuch, 2011, p. 1). However, even though the main characteristics of this target group are the same, there are always country- and culture-specific particularities to be taken in mind. The ANTO’s approach of having a uniform strategy for all markets defined by the headquarters, but adaptations when it comes to the marketing mix and the focus on which aspects of the brand should be communicated in each individual market, seems very skilled. The organisation trusts the individual market managers’ profound knowledge about the local specifics and can thus make adaptations geared to that market’s target group. Obviously, the ANTO case is only one example, but this approach could definitely lead to success for other DMOs, too.

Hence, in order to be able to develop a consistent and standardised cross-market and cross-cultural marketing strategy, that is nevertheless adapted to the individual market, DMO’s should have a powerful overall strategy which globally leads into one pre-defined direction and locally adapt this common strategy to regionally differing cultural specifics. Thereby, again, being aware of the different images people hold of the destination in question, can help adapting and customising the market-specific marketing approach. For example, the ANTO’s overall marketing strategy is to market Austria as an inspiring destination which is suitable for recreation and authentic encounters, and as a meeting point between tradition and modernity. The communication of this should vary from market to market, according to the already existing image and the needs and expectations. Swedes, for instance, view Austria as a very traditional country, and should be made aware of the fact that the
destination also has a very modern and exciting side to it. Findings also show that Austria’s image among Swedish tourists is best during the winter season. This, of course, should be kept, however, it is a good idea to locally also market Austria’s attractive offers for summer tourism. In other markets, other propositions might be more appropriate. Moreover, the case study shows that the Swedes’ spontaneous associations when thinking of Austria often relate to the local cuisine, which indicates that concentrating on the culinary part of the destination brand might lead to success in this market.

The above issue directly leads to the third, somewhat closely related research question, namely: Should marketing approaches be changed for people with different images of a country as a destination, or alternatively, should a “one-size-fits-all” approach be employed in which the same image is communicated to all potential visitors?

The evidence from studying the concept of branding suggests that this marketing approach should be performed on a global basis, because brand perception cannot be limited geographically. This notion would actually imply, that “one brand fits all customers”, as the whole point of branding is communicating a strong and consistent message. Nevertheless, it is necessary to be aware of the fact that customers’ cultural differences doubtlessly have an influence on how different they perceive the brand. Culturally differing norms, values and expectations, but also the individual psychology of perception play an influencing role on how a destination image and brand is perceived. Therefore, the answer to the third research question is that marketing approaches should be changed for people with different images of a destination. Even though a destination brand should be strong and consistent, it is not advisable to communicate the exact same image to all customers. In this regard, the ANTO’s market manager for Sweden (Tauschmann, 2011, p. 4) also emphasises that destinations cannot really be compared to other, universally applicable brands because the nature of destinations is very faceted and they are usually hard to grasp.

In the case of the ANTO, the general marketing strategy is implemented globally, but the managers in each individual market decide which exact approach is the most appropriate and promising. Hence, even though it makes sense to have a unified grand strategy, some aspects should be marketed differently according to the country’s particularities. In this context, the lack of research on the effects of cultural differences on the perception of destination image builds an essential limitation. Even though the case study revealed interesting and possibly generalisable answers, more research on this element would be needed to fully understand the country- and culture-specific features of destination image.

The case of the Austrian National Tourist Office, and the cultivation of the Swedish market in particular, show an internationally operating DMO’s approach of integrating tourist destination image into their marketing and branding activities. In addition to the knowledge gained from literature research, this case proved to be very useful for answering the underlying research questions by giving the opportunity of seeing behind the curtains of a real organisation and giving a good insight into how theory can be put into practice. However, even if some of the findings can probably be generalised, the ANTO case obviously shows only one way of doing things, once again demonstrating the usual limitation of case studies.
5.3 Personal reflection

The following paragraphs aim at describing the author’s personal thoughts, conclusions and critical statements that emerged during the composition of this dissertation.

For the composition of the theoretical chapter about destination marketing, the author has thoroughly dealt with the respective topic. Many scientific articles published in established tourism and marketing expert journals have been systematically read and analysed. In the course of studying the respective literature, the main theories about destination image were compared and included in this thesis. In so doing, the author was able to gain profound expertise of the subject, which was deemed fundamental and necessary for compiling this paper. Already having collected the knowledge about scientific studies in the field of destination image, the author then approached marketing experts employed at the Austrian National Tourist Office.

The discussions, in form of e-mail communication and a personal meeting, allowed to gain insights into real life practice of an internationally operating DMO, hence approaching the subject from a different angle. The communication with these experts provided certain information that would have definitely been hard or even impossible to get from merely examining the respective literature, as it is taken from hands-on experience. The author’s expressed aim of this study was among others to evaluate theory and practice in the field of image in destination marketing. However, even though the literature review as well as the information gained from specialists both were very informative and useful and were both used for the above answers of the research questions, one of the main conclusions of this thesis was the realisation that such a “comparison” is not easy to make.

Considering the scientific theories and models on the one hand, and the actually applied practices on the other, the author became conscious that they certainly do not always go together. It seems to the author of this thesis that it is rather the case that professional tourism organisations, as far as it can be generalised from taking the Austrian example of the ANTO, do not engage so much in tourism theory but in “real life” instead. This awareness somehow came as disillusionment, making the author apprehend that real life simply does not always work as the models do in the literature. However, this should by no means imply that the authorities do not have the respective knowledge, but rather that they just apply what is appropriate for their use.

Moreover, it has to be considered that organisations such as DMOs are not differing from any other business and have to deal with certain budgetary constraints. Often, it is only the lacking budget that hinders them to engage in more research or marketing activities. Correspondingly, the case of the Swedish ANTO office in Stockholm very well shows that market research as well as marketing activities in a cultivated market can only be carried out as long as there is enough money granted for that certain purpose from the above authorities. This has also to do with personnel-related issues, as it is clear that an office with only two employees, as it is the case in Stockholm cannot be expected to attain as much as an office with eight employees can, such as the one located in London (Tauschmann, 2011, p. 1).

Nevertheless, considering that Austria is relatively small, not only in size but also when it comes to economical matters, its general performance in tourism is outstanding. To some extent, even though no direct relationship could be found from any according studies, the
high number of tourist arrivals and overnight stays must be linked to the positive image Austria has as a tourism destination. Even though the ANTO cannot form an image from scratch because it is partly already positioned in people’s minds, the organisation does have the power and control to reinforce as well as slightly amend Austria’s destination image. As could be discovered during dealing with ANTO experts and in-house documents, the organisations is very professional in doing its job in this regard, and all of the activities are well-founded on specialist knowledge. If the ANTO can continue to carry out image-related studies also in the future and find out which image Austria has among its prospective visitors, the marketing campaigns can be adapted accordingly and be tailored exactly to the expectations of the target group.

5.4 Limitations and further research

The author’s above discussed personal concerns can somewhat be considered limitations already. Other than that, some additional issues became apparent during the work on this dissertation. As outlined before, the main limitation of this thesis is the fact that it included a case study and the generalisation of the empirical findings is therefore limited.

Moreover, one of the main problems detected during the compilation of this thesis was the fact that many DMOs, including the Austrian National Tourist Office, do not measure visitor perceptions on a continual basis. However, in order to be truly representative, investigations on image and destination branding effectiveness need to be carried out not only before, but also during and after the stay at the destination. Only in that way, it can be determined whether the transmitted image that formed visitor expectations is really matching the later perceived image formed through the actual destination experience. If such studies are not carried out, there is a high risk for DMO’s to “oversell” their destination based on the promotion of unrealistic images and visitors subsequently being unsatisfied. If destinations want to enhance repeat visitation and positive word of mouth, repositioning the brand should be considered.

Blain, Levy and Ritchie (2005, p. 337) state that “[p]erhaps the lack of effort to measure consumer perspectives of the destination is a matter of not understanding what exactly to measure or how to measure it. Further research could investigate the reasons that DMOs are not measuring perceptions or the success of their marketing efforts”.

Another critical point was the finding that even though this thesis has depicted the utmost importance of image studies for the field of marketing, it has to be realised that image assessment alone will not necessarily lead to success. Other variables concerning a destination, such as price or access, are at least as significant.

As indicated in the author’s personal reflections, one source of weakness in this study was that the studied theory and the findings from the case study were only partly compatible. However, this is not so much a limitation than rather a realistic depiction of the fact that tourism is actually a very hands-on sector, but is often “scientificated”.

A final recommendation the author wants to give at this point is that it might be a good idea in the future to try to bring together tourism science and practice more. Taking real life cases as a basis for developing theories and models would not only help organisations to standardise their approaches but also assure that the very practical field of tourism is not
too much academicised. In that way, DMOs could learn from each other and best case examples could become the norm.

Seen how much attention is given to marketing and branding tourism destinations all over the world and considering the importance of imagery in that context, as it was found during this thesis, it must be made sure that all DMOs are made aware of the vital meaning of image and image-related studies for the overall success of every tourist destination…
LIST OF REFERENCES


Destination image and its effects on marketing and branding a tourist destination


APPENDIX
Katharina Sonnleitner

In welchen Bereichen wird von der ÖW Tourismusforschung betrieben?

Unsere Hauptschwerpunkte sind:

- **T-MONA (Tourismus Monitor Austria):** Befragung der Gäste in Österreich während ihres Urlaubsaufenthaltes
- **Länderstudien:** Befragung der auslandsreisenden Bevölkerung zu deren Reiseverhalten und zum Image Österreichs
- **Deutsche Reiseanalyse:** Befragung der reisenden Bevölkerung zu deren Reiseverhalten und Reiseinteressen
- **Screening von Trends (generelle und touristische Trends)**
- **Statistiken (Österreich-Tourismus, Europa-Tourismus, Welttourismus)**
- **Qualitative Studien (auch morphologische Wirkungsanalysen)**
- **Kundenbefragungen**
- **Werbemitteltests/ Untersuchungen zur Marke und zum Image**
- **Zielgruppenforschung**

Nach welchen Kriterien wurden die Märkte zusammengefasst? Warum zum Beispiel bilden Großbritannien, Dänemark und Schweden einen Markt? Was ist mit Ländern, die in keinem dieser Märkte vertreten sind?

Der Regionseinteilung und -bearbeitung gehen intensive strategische Überlegungen voraus, die sich auf eine Vielzahl verschiedenster Parameter stützen. Alle dazu veröffentlichten Informationen finden Sie auf [http://www.austriaturism.com/xxl/_site/int-de/_area/465217/marketing.html](http://www.austriaturism.com/xxl/_site/int-de/_area/465217/marketing.html)

Soll die Marke *Urlaub in Österreich* universell einsetzbar sein, oder wird sie je nach Bedürfnissen der Märkte verändert?


Worin liegen die Besonderheiten des Marktes Schweden? Wie reagiert dieser Markt auf die Marketingaktivitäten der ÖW?

Wenden Sie sich diesbezüglich bitte an unser Büro in Stockholm.

Wie oft werden Marktanalysen durchgeführt?


Können Sie die wichtigsten Ergebnisse der Marktanalyse Schweden, die 2008 durchgeführt wurde, zusammenfassen?

Siehe Attachement.

Wie kann eine DMO erreichen, über unterschiedliche Märkte und Kulturen hinweg weitgehend einheitliche und doch realistische Strategien zu entwickeln?


Mit welcher Methode lässt sich das Image, das Leute von einer Destination haben, am besten feststellen?


Was ist das allgemeine Image der Destination Österreich? Variiert es in den unterschiedlichen Kulturen und Märkten?

Es gibt nur wenige Kriterien und Eigenschaften die Österreich von allen Ländern gleichermaßen zugeordnet werden. Das Image Österreichs hängt stark davon ab, wie gut ein Markt Österreich kennt und welche Reiseinteressen und welches Reiseverhalten dieser Markt generell zeigt. Anbei einige Aussagen dazu:

Spontanassoziationen


Eignung für Urlaubsarten

Bei der Eignung für Urlaubsarten sind sich alle einig: Österreich ist vor allem ein Wintersport- und Wanderurlaubsland! Nach dem Wintersport und dem Wandern sieht das Ranking entsprechend den Vorlieben und Erfahrungen der einzelnen Märkte recht unterschiedlich aus:

So folgt bei den Urlaubern aus Tschechien, Belgien und Dänemark der Sommeraktivurlaub an dritter Stelle. Auch bei den Schweizern ist der Sommeraktivurlaub unter den Top 5 gelistet. Auch der Kultururlaub scheint bei allen Ländern (außer den Tschechen) unter den Top 5-Platzierungen auf. Die Dänen, die Briten, die Schweizer, die Schweden und natürlich die Italiener sehen auch die Kompetenzen Österreichs für Städtereisen. Für die Schweizer ist Österreich zudem für Wellnessurlaub geeignet, für die Franzosen für Rundreisen und für die Tschechen und Briten für Radfahr- und Mountainbikeurlaub.

Eigenschaften des Urlaubslandes Österreich


Einiger sind sich die Länder darüber, welche Eigenschaften nicht auf Österreich zutreffen.

So ist Österreich für kein Land langweilig, überlaufen, laut oder alltäglich. Österreich ist aber auch nicht einzigartig oder außergewöhnlich. Auch die Vielfalt spricht man Österreich vor allem in Dänemark, Großbritannien und Belgien ab.

Stärken und Schwächen des Urlaubslandes Österreich


KS: Worin liegen Ihrer Meinung nach die Verbesserungschancen der ÖW?

MM: ---

German transcription Michenthaler 2011, page 3
Questions answered by e-mail by Marion Michenthaler, ÖW project manager for market studies

Translated version in English language

Date of receipt: 1.4.2011

KS: Katharina Sonnleitner
MM: Marion Michenthaler

KS: In which fields does the ANTO engage in research activities?

MM: Our main foci are:

- T-MONA (Tourismus Monitor Austria): guest surveys during their stay in Austria
- Country specific studies: surveys measuring the travelling population’s behaviour and the image of Austria
- Travel analysis specifically for the German market: surveys about the travelling population’s travelling behaviour and interests
- Trend Screening (general and tourism related trends)
- Statistics (tourism in Austria, tourism in Europe, world tourism)
- Qualitative Studies (also morphological effect analyses)
- Customer surveys
- Tests on advertising material / inquiries about the brand and the image
- Research concerning target groups

KS: According to which criteria did the ANTO combine its markets? For example, why do the countries Great Britain, Denmark and Sweden form one single market? What about countries that are not represented in any of the markets?

MM: The regional arrangements are made based on intense preceding strategic considerations, which are founded on numerous parameters. You can find all the related published information under http://www.austriatourism.com/xxl/_site/int-de/_area/465217/marketing.html.

KS: Should the brand Urlaub in Österreich (Vacation in Austria) be universally applicable, or is it getting adapted according to the individual markets’ requirements?

MM: In all markets, we want to establish the brand essence of “inspirational recreation”. Thereby, we mainly reach the target group of established postmaterialists, who act as a kind of trendsetters. But of course there are also adaptations for each of the individual markets (such as for example subject choice, media planning, etc.). You can find all details relating to the brand under http://www.austriatourism.com/xxl/_site/int-de/_area/465223/_subArea/465287/ci-cd-marke-urlaub-österreich-oesterreich-logo%20.html

KS: What are the characteristics of the Swedish market? How does this market react to the ANTO’s marketing activities?

MM: Concerning this matter, please contact our office in Stockholm.

KS: How often are market analyses carried out?

English transcription Michenthaler 2011, page 1
Each year we carry out an analysis of one country. The respective markets are examined in intervals of six to eight years. Additionally, we conduct surveys of visiting guests in Austria every two years. Therewith, we cover all important markets, making up for around 90% of overnight stays in Austria. A statistical evaluation of each market takes place every year, whereby touristic as well as economic data are analysed.

Could you summarise the findings of the Swedish market analysis, which was carried out in 2008?

See attachment.

How can a DMO, across different markets and cultures, achieve to develop a consistent, somewhat standardised, and yet realistic marketing strategy?

A generally valid answer to this question is not possible. This must be elaborated and discussed individually for each DMO. However, it is certainly not reasonable to work with every topic in every market. Accordingly, the respective DMO’s offer would have to be analysed, and only then it is possible to recommend country specific recommendations.

Which method best captures the image people hold of a destination?

In our country specific studies, one third of the investigations is dedicated to the image part. We try to find out about the image through open questions (spontaneous associations about the holiday destination Austria), as well as through closed ones. By means of closed surveys we inquire the features and characteristics, as well as the suitability for certain forms of vacation and length of stay (short or long stay) of the destination Austria. When it comes to the selection of Austria as a destination, we also ask about the most important choice criteria (analysis of strengths and weaknesses). The covered issues thereby reach from fields like weather/ landscape/ traffic to price/ accommodation/ sociability, but also the touristic offers are considered. Hereby, a comparison between people who actually do spend a vacation in Austria and those who do not is interesting, because it reveals unknown strengths and weaknesses. Also the “I don’t know”-component can give hints about which offers are not well enough known on the market yet.

What is the general image of Austria as a tourist destination? Are there any variations across different cultures and markets?

There are only few criteria and characteristics which are related to Austria by all countries. The image of Austria strongly depends on a market’s knowledge about Austria and this market’s general travel interests and behaviour. Enclosed, a few according statements:

**Spontaneous associations:**

In all countries, Austria stands for mountains, beautiful landscapes and winter sports. In almost all countries, Vienna can be found among the top 5 associations (except in Switzerland and the Netherlands).

In addition to these top associations, each country holds its own individual associations about Austria: The Swedes, for example, think about the food, beer and wine, but also about culture, music and dance. The Italians associate beautiful cities with nice parks and large green areas. Belgians spontaneously mention the hiking possibilities, while the French focus on hospitality, classical music and excellent gastronomy. Likewise, the Swiss also have associations about hospitality and food. Then again, when the British think about Austria, snow and picturesque views cross their minds. Snow is a spontaneous association stated by the Danes, too. Dutch people, on the other hand, think about Austria’s weather and cordiality and amiability (especially when it comes to après-ski).
Suitability for certain types of holidays

Opinions converge on the suitability for types of holidays: Austria is above all a destination for winter sports and hiking holidays! Besides that, the individual markets’ preferences and experiences differ considerably:

For example, Czech, Belgian and Danish tourists rank active summer holidays at the third place, and also for Swiss tourists this type of holiday is listed among the top five. Besides, culture tourism appears among the top five holiday types in all countries, except the Czech Republic. The Danish, British, Swiss, Swedes and Italian see Austria as a perfect destination for city trips. While Swiss people like Austria for wellness holidays, French consider it as adequate for round trips and British for cycling and mountain biking trips.

Characteristics and features of Austria as a destination

Austria is viewed as a cultivated and neat destination in all countries. The majority also considers it as being sporty (except France and Italy). When it comes to all the other characteristics, however, there is no consensus across all countries. Especially among the Nordic countries and Belgium, as well as by its neighbours Switzerland and Germany, Austria is considered as a hospitable and welcoming. The feature “relaxing” is only referred to by the Swiss, Czech and Dutch. Furthermore, only British and Danes see Austria as eventful. The quality of being a particularly “healthy” destination is important for the Belgians, French, British and Dutch, while it is considered pleasurable only by the British and French, and traditional by Italians and Swedes. Additionally, the Swedes, Germans and Czech especially appreciate the security. Among Swiss and French people, Austrians are considered to be very friendly and likeable. The Italians underline the Austrians’ environmental consciousness, while, on the contrary, the Swedes rank this feature rather badly. For them, instead, Austria is modern, which is an opinion about Austria that no other country shares with them.

Concerning the question which characteristics do not apply to Austria, the countries show more agreement.

Thus, Austria is not considered to be boring, overcrowded, noisy or ordinary by any of the countries. However, it is not unique or exceptional either. Furthermore, especially Denmark, Great Britain and Belgium do not think that Austria is diverse.

Austria’s weather/climate and especially the lack of swimming and bathing opportunities, are classified as weakness. In Switzerland, Belgium, Italy and the Netherlands, Austria is not considered to be destination appropriate for young tourists. Furthermore, Austria is not a country with a high prestige factor (whereby this is usually not a decisive factor for destination choice anyways). Concerning price levels, not much is known. Among the British, Czechs, Italians, Dutch and Swedes, Austria is not viewed as cheap, but the price-performance-ratio is rated as very good (except by the British and Germans). From the viewpoint of the Czech, Italians and French, another drawback is represented by the communication problems. Belgians and Dutch people criticise Austria’s nightlife, for the Swiss Austria is too similar to their home country, Italians miss conviviality, and Dutch would like to have more offers in case of bad weather.

KS: In your opinion, what are the ANTO’s improvement opportunities?

MM: ---
Questions answered by e-mail by Michael Scheuch, 
ÖW division manager for brand management

Original version in German language

Date of receipt: 7.4.2011

KS: Katharina Sonnleitner
MS: Michael Scheuch

KS: Seit wann vertritt die Österreich Werbung die Marke Urlaub in Österreich?

MS: Seit 2007 – Markenvertiefungsprozess

KS: Wie sieht die Zielgruppe für die Marke Urlaub in Österreich aus?

MS: Auf unserer B2B-Seite www.austriatourism.com unter dem Link
finden Sie das Markenhandbuch zum Downloaden. Dort finden Sie alles Wissenswerte über unsere
Zielgruppe für die Marke Urlaub in Österreich.

KS: Welche Art von Marktforschung wird betrieben, um die Zielgruppe(n) zu definieren?

MS: Ein international tätiges Unternehmen wie die Österreich Werbung bedarf einer globalen
marktstrategischen Planung und damit verbunden einer länderübergreifenden Zielgruppen-
Definition. Es gilt, über unterschiedliche Märkte und Kulturen hinweg weitgehend einheitliche und
doch realistische Strategien zu entwickeln. Die Basis dafür bilden die Berichte der Sinus-Milieus®
in Western Europe und Central Eastern Europe, die acht wichtige länderübergreifende Lebenswelt-
Segmente in den sogenannten Sinus-Meta-Milieus® ausführlich beschreiben.

KS: Gibt es dabei länderspezifische Ergebnisse? Versucht die ÖW in den individuellen Märkten
diverse Zielgruppe(n) zu erreichen?

MS: Nein, basierend auf den Sinus-Meta-Milieus® wurde die Gruppe der Established Post-Materialists
als Zielgruppe der Marke Urlaub in Österreich erarbeitet. Hinter dieser länderübergreifenden
Zielgruppe stehen in den jeweiligen Ländern die Segmente der modern orientierten Oberschicht
(siehe Grafik im Markenhandbuch).

KS: Soll die Marke Urlaub in Österreich universell einsetzbar sein, oder wird sie je nach
Bedürfnissen der Märkte verändert?

MS: Ja, die Markenstrategie der Marke Urlaub in Österreich soll global in der Österreich Werbung
umgesetzt werden.

KS: Eine Marke muss auf den Stärken der Destination aufgebaut sein. Welche sind Österreichs
Stärken?

MS: Drei Substories, die wir in der Kommunikation erzählen, machen Urlaub in Österreich einzigartig
(siehe Markenhandbuch):

Substory 1: Ein Land, das sich als kulturelles Zentrum Zentraleuropas entfaltet.
Substory 2: Ein Land, das zu leben versteht.
Substory 3: Gastgeber, die sich für das Urlaubsglück engagieren.

German transcription Scheuch 2011, page 1
KS: Seit wann wird mit der neuen Markenessenz „Inspirierende Rekreation“ gearbeitet?
MS: Seit 2007
KS: Wie spricht der schwedische Markt auf die Marke und auf allgemeine Marketingaktivitäten der ÖW an?
MS: Bitte Informationen aus dem Marktprofi Kompakt Schweden entnehmen. Sollten Sie weitere Fragen haben, bitte um Kontaktaufnahme mit unserem Marktmanager.
KS: Ist die ÖW Ihrer Meinung nach erfolgreich in der langfristigen Repräsentation einer starken und „wertvollen“ Marke?
MS: Ja, da sich die Marke Urlaub in Österreich an eine bestimmte Zielgruppe mit 3 einzigartigen Geschichten wendet, die glaubwürdig, emotional belohnend und attraktiv sind. Das macht aus Urlaub in Österreich eine starke und wertvolle Marke.
KS: Hat sich die Marke der ÖW im Laufe der Zeit (zu) oft verändert?
MS: Nein, die Inhalte der Marke Urlaub in Österreich ändern sich nicht (zu) oft, weil vertrauenswürdige touristische Marken auf der „DNA“ ihrer Region aufbauen. Sie meinen das äußere Erscheinungsbild, die Kampagnen, die seit 1955 beständig weiterentwickelt werden, da sich Ästhetik, Stil, Sprache etc. ändern und eine Marke nicht an den aktuellen Trends vorbeigehen darf.
KS: Die Marke Urlaub in Österreich muss sich aus der harmonischen, friedlichen, heimeligen und tröstlichen, ländlichen Beschaulichkeit lösen und herausfordernder, spannender, berauschender, an- und aufregender werden. Wie kann das erreicht werden?
MS: Markenkonforme Kommunikation entsteht aus dem Zusammenspiel der richtigen Inhalte (Substories und Markenkern, Ansprache der Bedürfnisse der Zielgruppe) mit dem richtigen Stil (Corporate Identity/Corporate Design, Corporate Language, Codes).
KS: Wie funktioniert die Zusammenarbeit der ÖW mit den österreichischen Tourismusanbietern? Welche Rolle spielt die Marke Urlaub in Österreich für diese und wie kann es erreicht werden, dass sie überzeugte Vertreter dieser Marke werden?
MS: Das ist der konkrete Auftrag an die Österreich Werbung. Die Österreich Werbung führt die Marke Urlaub in Österreich, investiert in die international erfolgversprechenden Märkte und stellt als wesentlicher Netzwerknomen in diesem Tourismussystem ein produktives Zusammenwirken her und trägt durch ihr Selbstverständnis zum umfassenden Ausschöpfen der Synergiepotenziale im österreichischen Tourismus bei. Die „Allianz Tourismus Marketing“ wird unter der Federführung der Österreich Werbung die Kräfte für ein effizientes Auslandsmarketing bündeln.
KS: Es heißt, dass Markenführung global durchgeführt werden, weil die Markenwahrnehmung nicht auf geografische Regionen eingegrenzt werden kann. Glauben Sie jedoch, dass kulturelle Unterschiede eine Marke anders wahrnehmen lassen?
MS: Die Markenstrategie wird global umgesetzt, aber die Regionsmanager in den Märkten entscheiden, welche Markt- und Marketingstrategie die erfolgversprechendste ist. 2011 konzentriert sich die ÖW auf die Bearbeitung von Märkten in den drei geographischen Räumen Westeuropa, CEE und Übersee. Diese Märkte, in denen die ÖW auch mit eigenen Büros vertreten ist, decken etwa 95% aller Nächtigungen ab und weisen das größte Potenzial für den heimischen Tourismus auf. In allen anderen Ländern ist die ÖW erste Ansprechpartnerin für touristische Projekte.
KS: In der Fachliteratur heißt es “Tourism marketers’ goal is to match to the greatest extent possible the promoted and the perceived image”. Ist dies auch das Ziel der ÖW und ist sie darin erfolgreich? Kann die Marke *Urlaub in Österreich* als “promoted image” angesehen werden?

MS: Ja, natürlich. Drei Substories, die wir in der Kommunikation erzählen, machen *Urlaub in Österreich* einzigartig:

Substory 1: Ein Land, das sich als kulturelles Zentrum Zentraleuropas entfaltet.
Substory 2: Ein Land, das zu leben versteht.
Substory 3: Gastgeber, die sich für das Urlaubsglück engagieren.

Der Erfolg, wird alle zwei Jahre bei der Zielgruppe gemessen.

KS: Worin liegt der Zusammenhang zwischen Destination Branding und Destination Image?


KS: Vertreten Sie eher die Meinung, dass Branding auf dem schon bestehenden Image einer Destination aufbauen soll, oder kann das Image durch gezielten Einsatz von Marken verändert werden?


KS: Wie kann eine DMO erreichen, über unterschiedliche Märkte und Kulturen hinweg weitgehend einheitliche und doch realistische Strategien zu entwickeln?


KS: Worin liegen Ihrer Meinung nach die Verbesserungschancen der ÖW?

MS: In Summe liegt die Verbesserungschance des österreichischen Tourismussystems im Bündeln der Kräfte im Tourismusmarketing!
Questions answered by e-mail by Michael Scheuch, ÖW division manager for brand management

Translated version in English language

Date of receival: 7.4.2011

KS: Katharina Sonnleitner
MS: Michael Scheuch

KS: Since when has the ANTO been representing the brand Urlaub in Österreich?
MS: Since 2007 – process of brand consolidation

KS: How would you describe and classify the target group for Urlaub in Österreich?

KS: Which kind of market research does the ANTO conduct in order to define the target group?
MS: An internationally operating business like the ANTO needs global strategic planning, including a transnational definition of its target group. The most important issue is to develop a consistent, somewhat standardised, and yet realistic marketing strategy across different markets and cultures. The foundation for that is composed by the reports of Sinus-Milieus® in Western Europe und Central Eastern Europe, which describe in detail eight important cross-country living environment segments, the so-called Sinus-Meta-Milieus®.

KS: Are there any country specific results? Does the ANTO try to reach different target groups in the individual markets?
MS: No, based on the Sinus-Meta-Milieus®, the group of established post-materialists was developed as target group for the brand Urlaub in Österreich. Behind this cross-national target group are standing the segments of the individual countries' modern oriented upper class (see illustration in the brand manual).

KS: Does the brand Urlaub in Österreich aim to be universally applicable, or is it changed according to the individual needs of each market?
MS: Yes, the ANTO wants to apply the branding strategy of Urlaub in Österreich on a global basis.

KS: A brand has to be based on the strengths of a destination. Which are Austria’s strengths?
MS: Three sub-stories, which we talk about in our communication, make holidays in Austria unique (see brand manual):

Sub-story 1: A country, which unfolds as cultural heart of Central Europe
Sub-story 2: A country, which understands how to live (savoir-vivre)
Sub-story 3: Hosts, who are committed to the holiday fortune

English transcription Scheuch 2011, page 1
KS: Since when has the ANTO been working with the core brand identity “inspirational recreation”?

MS: Since 2007

KS: How does the Swedish market react to the brand and to the ANTO’s marketing activities in general?

MS: Please take the relevant information from the “Marktprofi Kompakt Schweden” (report on the Swedish market). If you have further questions, please get in touch with our market manager in Sweden.


KS: In your opinion, is the ANTO succeful in the long-term representation of a strong and “meaningful” brand?

MS: Yes, because the brand „Urlaub in Österreich“ is directed towards a certain target group with its three unique stories, which are believable, emotionally rewarding and attractive. That makes Urlaub in Österreich a strong and meaningful brand.

KS: Do you think that the ANTO’s brand has changed (too) often?

MS: No, the brand’s content does not change (too) often, because trustworthy touristic brands are based on the “DNA” of the region. You probably mean the external appearance, the campaigns which have since 1955 consistently been redefined and enhanced and will continue to do so, because aesthetics, style, language etc. are changing and a brand cannot ignore current trends.

KS: The brand Urlaub in Österreich has to leave behind its harmonious, peaceful, homey and comfortable tranquility and become more provoking, exciting, exhilarating, activating and thrilling. How can that be achieved?

MS: Brand-compliant communication develops out of a combination of the appropriate content (sub stories and the core brand identity, addressing the needs of the target group) with the right style (corporate identity/ corporate design, corporate language, codes).

KS: How does the collaboration between ANTO and the Austrian tourism suppliers work? Which role does the brand Urlaub in Österreich play for them and how can they become convinced ambassadors of this brand?

MS: That is the concrete assignment for the ANTO. It represents the brand Urlaub in Österreich, invests in international promising markets and builds a productive cooperation. Therewith, the ANTO contributes to the exploitation of synergetic potential in Austria’s tourism.

The “Allianz Tourismus Marketing” (alliance tourism marketing) will, managed by the ANTO, pool the resources for efficient marketing on an international basis.

KS: It is said that branding should be performed on a global basis, because brand perception cannot be limited geographically. Nevertheless, do you think that cultural differences among the customers have an influence on how different they perceive the brand?

MS: The marketing strategy is implemented globally, but the market managers in each individual market decide which market- and marketing strategy is the most appropriate and promising. In 2011, the ANTO concentrates on three geographical areas, namely Western Europe, Central and Eastern Europe, as well as overseas. These markets, in which the ANTO is represented by own offices, cover about 95% of all overnight stays and show the greatest potential for incoming tourism. In all other countries, the ANTO is the first contact when it comes to any kind of tourism related projects.
KS: In the respective touristic literature it is said that “Tourism marketers’ goal is to match to the greatest extent possible the promoted and the perceived image”. Is that also the ANTO’s goal and is it successful? Can the brand Urlaub in Österreich be considered as “promoted image”?

MS: Yes, evidently. Three sub-stories, which we talk about in our communication, make Urlaub in Österreich unique:

Sub-story 1: A country, which unfolds as cultural heart of Central Europe
Sub-story 2: A country, which understands how to live (savoir-vivre)
Sub-story 3: Hosts, who are committed to the holiday fortune

The success among the target group is measured every second year.

KS: What is the link between destination branding und destination image?

MS: Destination branding is directed into the future. Which pictures or feelings should the brand Urlaub in Österreich evoke in the future? The image of a destination, on the other hand, has developed in the past and reaches into the present. A positive image is a foundation on which communication can be built on. Austria, for example, has a global image for classical music. And this classical music, newly interpreted and staged, shows a new facet of Austria and can be exciting for a certain potential target market.

KS: Are you rather of the opinion that branding should be based on the already existing image of a destination, or can the image be influenced and changed through the strategic application of brands?

MS: That depends on the status quo of the image. If the image complies with the existing strengths, we can strategically build on it. However, if it does not comply with the strengths and products, an image change would be desirable. Such a planned change of image can only be achieved through a (long-term) marketing strategy (see brand manual).

KS: How can a DMO, across different markets and cultures, achieve to develop a consistent, somewhat standardised, and yet realistic marketing strategy?

MS: The strengths and also the brand of a holiday destination should be consistent. The arrangements and design of the marketing can then be adapted to regional situations.

We are concentrating on innovative brand management, being present in the most important source markets, creative marketing, as well as the transfer of knowledge within the industry. We paint a picture of the future and set the agenda through our targets. These targets are planned in agreement with the decision makers in the tourism industry and we constantly try to find improvements.

KS: In your opinion, what are the ANTO’s improvement opportunities?

MS: In total, the improvement opportunity for the Austrian tourism system is the pooling of resources in tourism marketing!
KS: Worin besteht Ihre Aufgabe als ÖW Marktmanager für Schweden?


KS: Suchen Sie diese Journalisten, oder kommen die von selbst zu Ihnen?


KS: Arbeiten Sie auch mit schwedischen Reisebüros zusammen?

German transcription Tauschmann 2011, page 1
Ja, das machen wir auch, das ist ein Schwerpunkt meiner Mitarbeiterin. Wir veranstalten Workshops und bringen das österreichische touristische Angebot mit schwedischen Reiseveranstaltern zusammen. Dieses Jahr im Juni zum Beispiel laden wir schwedische und dänische Reiseveranstalter ein, nach Österreich zu kommen.

Wir haben drei Stationen, unter anderem Zell am See und die Kitzbühler Alpen und laden die Reiseveranstalter ein, sich mit den Österreichischen Anbietern, sprich den Hotels oder Tourismusverbänden, ihre Geschäfte auszumachen. Wir bieten diese Plattform und sind somit der Vermittler.

MT: Wenn schwedische Touristen an der Destination Österreich interessiert sind, informieren sich diese meist über das Internet?

Genau, das meiste passiert dabei über das Internet, dafür geben wir auch den größten Teil unseres Marketingbudgets aus. Die Internetseite www.austria.info gibt es auch auf Schwedisch, meine Mitarbeiterin ist die Redakteurin dieser Website, auf der es sämtliche Inhalte, Kampagnen und Urlaubs Ideen gibt. Da kann man auch unsere Image-Prospekte bestellen, oder online downloaden.

KS: Diese Websites sind aber je nach Markt unterschiedlich, inwiefern gibt es da Bestimmungen aus der ÖW-Zentrale in Wien?

Wir haben natürlich eine starke Zusammenarbeit mit unserem e-Marketing Team in Wien, die schon diverse Vorgaben geben, zum Beispiel technischer Natur, wie die Seite aufgebaut sein soll. Inhalte kommen teilweise vom Brand Management, die gilt es aber natürlich auf den Markt abzustimmen. Da geht es vor allem um die Marke, die ja nicht nur aus dem Logo, sondern auch aus Werten und story-telling besteht. Diese Marke entsteht ja auf Deutsch, und dabei gibt es einen Sprachkorridor, mit diversen Wörtern, die wir verwenden sollen, die die Marke transportieren und solche, die “no go’s” sind. Das wird in Wien auf Deutsch festgelegt und für die Übersetzung arbeiten wir mit schwedischen Journalisten zusammen, die uns die Texte, natürlich nach unseren Vorgaben, aufbereiten, damit das Schwedisch für die Zielgruppe mit der wir kommunizieren wollen, passend ist. Also die Vorstellung, die Deutschen Teste eins zu eins ins Schwedische zu übersetzen, das funktioniert nicht.

KS: Wie sieht die Zusammenarbeit mit der ÖW-Zentrale in Wien aus?


KS: Werden diese Pläne jährlich neu verändert?

Wir arbeiten mit einer Strategie, die über drei Jahre geht, aber die Konzepte werden leicht verändert und die Marketingpläne werden jährlich angepasst.

KS: Seit wann gibt es ein ÖW-Büro in Stockholm?

KS: Schweden, Dänemark und Großbritannien werden als ein Markt zusammengefasst - Weshalb, und warum nicht auch zum Beispiel Finnland und Norwegen?


KS: Die Zielgruppe für die Marke Urlaub in Österreich sind die “established postmaterialists”. Trifft das auch auf Schweden zu?

MT: Ja, das ist die Zielgruppe für alle Märkte. Natürlich haben wir uns dann stark damit befasst, wie die Ausprägung hier in Schweden ist, da es sich ja um eine Deutsche Zielgruppen-Studie handelt. Generell ist die Zielgruppe in Westeuropa sehr ähnlich, mit Unterschiedlichen Ausprägungen. Wir haben die Zielgruppe dann hier am Schwedischen Markt nochmals untersucht. Zum Beispiel, welche schwedischen Medien werden von Ihnen gelesen? Wie schaut eine typische Familie der schwedischen established postmaterialists aus und was wollen sie im Urlaub? Wo sind sie im Internet aus, wie können wir sie erreichen?

KS: Und wie wurde das untersucht?

MT: Wir versuchen natürlich auch, mit der Zielgruppe in Kontakt zu gelangen, indem wir aus privaten Kreisen Leute zu befragen, oder auch mit Journalisten zu reden, die für die zielgruppenaffinen Medien schreiben. Wir haben auch mit einem Institut zusammengearbeitet, das Medienanalysen durchführt. Die haben unser Briefing aufgenommen und für den schwedischen Markt analysiert, uns erklärt, welche Medien unsere Zielgruppe verfolgt, wo sie wohnt und so weiter.

KS: Was sind die Besonderheiten des schwedischen Marktes, im Vergleich zu anderen Märkten?


KS: Reisen die Schweden eher im Winter oder im Sommer nach Österreich?

KS: Welche Destinationen gelten hier in Schweden als direkte Konkurrenten Österreichs?


KS: Soll die Marke Urlaub in Österreich universell einsetzbar sein oder wird sie je nach Bedürfnissen der Märkte verändert?

MT: Generell ist es natürlich gut, wenn eine Marke universell einsetzbar ist, aber das ist bei einem Produkt wie Österreich ein bisschen schwierig, weil es nicht so greifbar ist und sehr viele Facetten hat. Man kann es ja nicht vergleichen, mit einer Marke wie Coca Cola. Bei und ist das Layout das gleiche, aber natürlich werden Sprachunterschiede angepasst.


KS: Wie spricht der schwedische Markt auf die Marke Urlaub in Österreich und auf allgemeine Marketingaktivitäten an?


KS: Wie wurde die Marktanalyse Schweden 2008/2008 erstellt?


KS: Und wie sahen die Ergebnisse dieser Analyse aus?

Wir wollen also versuchen, durch unsere Marketingkampagnen das Image ein bisschen jünger zu gestalten. Ein anderes Thema ist die Begegnungsqualität, also authentische Begegnungen mit den österreichischen Gastgebern. Mit dieser Gastfreundschaft punkten wir auch im Vergleich zu Frankreich und der Schweiz ganz stark.

KS: Worin liegt Ihrer Meinung nach der Zusammenhang von Destination Branding und Destination Image?

MT: Im Idealfall passen beide zusammen und überschneiden sich, ansonsten ist es schwer, Marketing dafür zu machen. Im Fall von Topmarken wie zum Beispiel „St. Anton“ passen das Image und das Branding sehr gut zusammen. Solche Marken sind auch für schlechte PR viel weniger anfällig, weil sie schon so etabliert sind.

KS: Und wie sieht das Image Österreichs hier in Schweden aus?


KS: Hat sich das Image Österreichs in Schweden verändert, und wenn ja, hat das mit den Marketingaktivitäten der ÖW zu tun?


KS: In der Fachliteratur heißt es „Tourism marketers’ goal is to match to the greatest extent possible the promoted and the perceived image“. Ist dies auch das Ziel der ÖW und ist sie darin erfolgreich? Kann die Marke Urlaub in Österreich als „promoted image“ angesehen werden?

MT: Die Marke Urlaub in Österreich ist definitiv ein promoted image und durch unsere Arbeit wollen wir natürlich das perceived image langfristig verändern, beziehungsweise an das promoted image angleichen.

KS: Vertreten Sie eher die Meinung, dass Branding auf dem schon bestehenden Image einer Destination aufbauen soll, oder kann das Image durch gezielten Einsatz von Marken verändert werden?

MT: Natürlich versuchen wir das Image ein bisschen zu verändern und es ist auf alle Fälle möglich, aber natürlich ist es schwierig, wenn die Marke die wir kommunizieren wollen und das Image nicht zusammenpassen. Aber in unserem Fall tut es das stark, und wir arbeiten daran.

KS: Wie kann eine DMO erreichen, über unterschiedliche Märkte und Kulturen hinweg weitgehend einheitliche und doch realistische Strategien zu entwickeln?


German transcription Tauschmann 2011, page 5
KS: Worin liegen Ihrer Meinung nach die Verbesserungschancen der ÖW, und was sind die Ziele der ÖW hier in Schweden?

KS: What are your tasks as ANTO market manager for Sweden?

MT: As we are an office with only two employees, I have a great variety of tasks. On the one hand I am responsible for employee leadership, personnel management, but also for strategies and goals, marketing planning, budgeting, controlling, as well as for the conception and implementation of all marketing activities.

In contrary to managers of ANTO offices with more employees I also have a strong operational field of responsibility. In London, for example, they have eight employees. There, the market manager is mainly responsible for strategy, leadership and budget related tasks and is not really involved in the operational parts. But here, with only two persons, we share our tasks.

Within the field of operations, also key account management is included. Hence, in order to being able to implement our marketing activities in Austria, we need local partners at the destination, and it is up to me to acquire those. In our office we also do public relations and press work with Swedish journalists. Thereby, our aim is to enthuse Swedish journalists about the destination Austria. Ideally, we send them to Austria and they write an article about it.

KS: Do you have to look for these journalists or are they coming to you?

MT: That depends. The good journalists, who write for newspaper that are read by our target group, are not coming, knocking on our door and saying they want to go to Austria, we really have to persuade them. With this kind of journalists, we have to elaborate ideas for an article together and make sure they are really going to do it. The term for this activity is “media pitching”, meaning that when I have a good story and think it might be interesting for the Swedish market, I call the chief editors of all important newspapers. But there are also those journalists, who like skiing and get in touch with me. If their stories are compatible with our brand, we can find an adequate destination in Austria and even finance their flights, accommodation and activities. All this should ideally happen in cooperation with our Austrian partner organisations. Last winter, for example, the ski resort of Sölden was very much hyped here in Sweden. The responsible tourism organisation of the Ötztal region had decided to become active here in Sweden. I am thereby acting as an intermediary between the Austrian organizations and Swedish multipliers such as journalists and tour operators.

Actually, PR is such a broad field, that we would need an extra employee just in charge of that work. Swedish journalists do not want to be paid by us, because that would not match with their journalistic work ethics, they rather want to report independently. This is not the case with freelance journalists, who are not employed by any publishing company, but have to sell their stories to any newspaper or magazine.

KS: Do you also cooperate with Swedish travel agencies?
Destination image and its effects on marketing and branding a tourist destination

MT: Yes, we do. That is the main task of my colleague. We organise workshops and bring together the Austrian touristic offers with Swedish tour operators and travel organisations. For example, this year in June, we are inviting Swedish and Danish travel organisations to Austria.

We will have three stations, among others Zell am See and the region of the Kitzbühler Alps. We invite the Nordic tourism organisations to directly get in touch with Austrian suppliers, like hotels or tourism associations, and arrange business deals. By providing this platform, the ANTO acts as an intermediary.

KS: If Swedish tourists are interested in the destination Austria, where do they get most of the information – the internet?

MT: Exactly, this mostly happens on the internet, we also spend the majority of our marketing budget on this media. The web site www.austria.info is available in Swedish language. My colleague is the editor of the website, which offers all contents, campaigns and holiday ideas. There, people can also order or download our image brochures.

KS: But these web sites are different depending on each market, aren’t they? In how far does the ANTO main office in Vienna give provisions?

MT: Obviously, we are in strong cooperation with our e-marketing team. They give certain provisions, for example how the web site should be built up. The contents are partly coming from the brand management division, but they have to be adapted to the market’s requirements. This mainly concerns the brand, which is made up not only of the logo, but also of certain values and storytelling.

This brand is developed in German language and there is a so-called “language corridor” with those words we are supposed to use for communicating the brand and those that are “no-go’s”. The words are decided upon in Vienna and here we collaborate with Swedish journalists, who help to adapt the texts, so the language is appropriate for the target group we want to communicate with. Just translating the texts word by word from German into Swedish, that does not work out.

KS: How does the cooperation with the ANTO main office in Vienna work?

MT: We are cooperating with Vienna especially in the fields of e-marketing and brand management. We also stand in close cooperation with the IMM International Market Management, the institution that coordinates all the market offices around the world. At the moment, we are in the middle of planning the year 2012. We all get certain guidelines about how to structure our campaigns. This includes strategic plans, but also plans concerning the budget or the brand.

A general ANTO strategy is formulated, including strategic market goals. Each market has its own market strategy and accordingly, each office has its market concepts and marketing plans. These incorporate operative targets, campaigns and the marketing mix, hence, which tools to use.

KS: And these plans are changed every year?

MT: We are working with a three year strategy, however, the concepts are slightly changed and the marketing plans have to be adapted on a yearly basis.

KS: Since when is there an ANTO office in Stockholm?

MT: Since 1950. Back then, we had a bigger office with more employees on Strandvägen. Then, for some years, the office was closed, and now, in our current form with two employees, we have been existing since October 2007.

English transcription Tauschmann 2011, page 2
KS: Sweden, Denmark and the United Kingdom are considered as one market – Why is that, and why are Finland and Norway, for example, not included?

MT: For years, Norway and Finland were included as well. Even though there was no own ANTO office in Finland, the Swedish office was in charge of handling the Finish market. Denmark was in charge of Norway and the Baltic states. However, in-depth studies let us come to the conclusion that with the provided budget we should rather focus on the two countries that show the most potential: Sweden and Denmark. Also in a population context, Norway and Finland are too small and do not show enough potential for intensive market development by the ANTO. The reasons for the fact that Sweden and the United Kingdom build one single market are on the one hand geographical ones, we are the region Northern Europe. On the other hand, it is about pooling our resources. The PR-office in London supports us in our PR-related work, their e-marketing teams helps us in developing our facebook campaigns. Still, the cooperation with the Danish office in Copenhagen is much closer, because we have common campaigns. Our campaigns are sold to the Austrian partners as one single campaign, that means, if a partner wants to take an interest in the Northern market, they take an interest in both countries.

KS: The target group for the brand Urlaub in Österreich are the “established postmaterialists”. Is that also the case in Sweden?

MT: Yes, that is the target group in all markets. As it was a German study that had found out this target group, of course it was necessary for us to study in detail in how far this group is developed here in Sweden, and what their particularities are. Generally, in Western Europe, this target group is very similar, however, with different characteristics. We investigated which Swedish media they read, what does a typical family of the Swedish established postmaterialists look like, what are they looking for when it comes to holidays? Where are they on the internet, how can we reach them?

KS: And how could you find that out?

MT: We try to get in touch with the target group by approaching people in our private circle of friends or by talking to journalists, who write for the targeted media. Moreover, we cooperated with an institution carrying out media analyses. They considered our briefing and analysed the Swedish market accordingly. Then, they explained us, which media our Swedish target group follows, where they live and so on.

KS: What are the characteristics of the Swedish market, compared to the other markets?

MT: You can read about these characteristics in our country study Sweden, which was conducted 2008/2009. This study was carried out by the ANTO’s market research department, and we are still strongly referring to it, as it was the only study carried out to that extent. Furthermore, we have a product manual for our campaigns that we compile for our Austrian partners. Now we know what the Swedes want, where they are seeking information, and how they imagine the ideal holiday product. It is our task to communicate that knowledge to our Austrian suppliers, so they can offer exactly what the Swedish guests expect from a vacation in Austria. In this manual, we explain our campaign „life enriching moments“, which characteristics do the Swedes have and what potential do they show. But this manual certainly incorporates more than the country study, namely our impressions that we got from communicating to journalists and travel organisations.

KS: Are the Swedes travelling to Austria rather in summer or in winter?

MT: When it comes to Swedish overnight stays in Austria, 60% are recorded in winter and 40% in summer. However, when it comes to the arrivals, there is a clear balance between winter and summer. The reason for more overnight stays in winter is the fact that tourists stay longer at the destination for skiing. Concerning skiing, Austria has a very good reputation among the Swedes, we are ranked on place one, even before France and Switzerland. But of course we are also standing in direct competition with Sweden itself.
KS: Which destinations are considered the main competitors of the destination Austria here in Sweden?

MT: That depends on the season and is quite different in summer than in winter. In winter, when it comes to skiing holidays, France and Switzerland, but also Norway and Sweden are strong competitors. In summer the competition is much more diverse, however, our main competitors are destinations who offer a similar product as we do. On the one hand, there is Norway, but also France and Switzerland are strong. Of course, in summer we also compete with popular summer destinations like Croatia, Turkey and Spain, even though they offer quite a different tourism product. Actually, we are competing with the whole world. Concerning city tourism, Vienna is becoming more and more popular among the Swedish tourists, and we directly compete with cities like London, Paris or Berlin.

KS: Should the brand Urlaub in Österreich (Vacation in Austria) be universally applicable, or is it getting adapted according to the individual markets’ requirements?

MT: Generally speaking, of course it is good if a brand can be applied globally, but that is quite hard in the case of the destination Austria, which is not so tangible and has many different facets. Our brand cannot be compared to a brand like Coca Cola. Our logo is always the same, but language differences have to be adapted.

Diverse aspects of our brand are marketed differently in each market, or have another importance respectively. The core of our brand is “inspirational recreation”, hence arriving in Austria and coming alive there. But arriving and coming alive has different connotations for different nations. This leads us back to the product manual I mentioned before, how the product should look like in order to be consistent with the brand and in order to make it possible for Swedish tourists to experience that arriving and coming alive. Hence, there are small differences in each market.

KS: How does the Swedish market react to the brand Urlaub in Österreich and to marketing activities in general?

MT: The brand Austria is well known among the Swedes. The country study reveals that 40% of all Swedes have been to Austria before. Urlaub in Österreich is the brand we are selling and we put it everywhere we engage in marketing activities. Of course, it is our goal to make our brand have positive connotations and we try doing that through or marketing activities and PR-related work. We have a basic logo which has been existing for a long time (signet with the Austrian flag in the background), however, the corporate design is changed from time to time. That means, also the current logo (bookmark “It’s got to be Austria”) will be replaced again. But obviously, everyone would be happy to have such a strong logo that would at the same time become the brand.

KS: How was the market analysis Sweden 2008/2009 composed?

MT: The basic framework for that analysis was the country study, which had been conducted by the main office in Vienna. The market analysis then examined carefully different Austrian tourism products which show potential on the Swedish market. We discovered potential, where Austria could possibly score. For example, is “A summer experience in the mountains” a product which is well received by the Swedes? Hence, we conducted product-market-analyses with several options, such as for example golfing in Austria, mountain biking or rather focusing on culture-related topics…

KS: And what were the results of this analysis?

MT: The analysis revealed that marketing summer holidays in the mountains has the biggest potential. Thereby, a special focus was put on cultural aspects. A little problem is the fact that especially in summer Austria has an image which is a little old. The hiking theme has an old connotation and therefore we try to focus on new topics such as culinary, or other outdoor activities.
Hence, through our marketing campaigns we want to try to make the image a bit younger. Thereby, another topic we focus on is positive encounters, authentic encounters with the Austrian host community. With our hospitality we score very well, especially in comparison to France and Switzerland.

KS: In your opinion, what is the link between destination branding and destination image?

MT: Ideally, the two are matching and overlapping. If not, it would be hard to engage in marketing. In the case of top brands like “St. Anton”, the image and the branding are harmonising very well. Brands like this are not so prone to bad PR, because they are so well established.

KS: And what is the image of Austria here in Sweden?

MT: Austria has the best image in winter. By now, reliable snow conditions are something we strongly focus on in or PR work. We also have a good image when it comes to winter sports infrastructure, hospitality and culture. Currently we are working on the culinary image. At the same time, Austria is perceived as a very traditional country, if not even conservative and old-fashioned. And that is the point where we want to lead into another direction through our branding, and we try to countervail with our campaigns.

KS: Has the image of Austria in Sweden changed, and if yes, is that related to the ANTO’s marketing activities?

MT: We are trying to introduce new aspects such as design in Austria and topics like wine, culinary, lifestyle or designer hotels to the Swedes. In addition to skiing and the somehow a little bit old-fashioned summer image, we try through our campaigns to incorporate the aspects of “design, wine, lifestyle”. Creative marketing activities in the field of videos, facebook and social media help us to communicate these new aspects.

KS: In the respective touristic literature it is said that “Tourism marketers’ goal is to match to the greatest extent possible the promoted and the perceived image”. Is that also the ANTO’s goal and is it successful? Can the brand Urlaub in Österreich be considered as “promoted image”?

MT: The brand Urlaub in Österreich is definitely a promoted image. Obviously, with our work we want to change the perceived image positively in the long term, and want to adapt it to the promoted image respectively.

KS: Are you rather of the opinion that branding should be based on the already existing image of a destination, or can the image be influenced and changed through the strategic application of brands?

MT: Of course, we try to change the image a bit and this is definitely possible, but it is certainly difficult if the brand we want to communicate and the image are not matching each other. However, in our case, they match very well and we are still working on it.

KS: How can a DMO, across different markets and cultures, achieve to develop a consistent, somewhat standardised, and yet realistic marketing strategy?

MT: The aim of a consistent strategy is that the brand should be perceived consistently, isn’t it. The perception of Austria is everywhere a bit different, this has to do with the psychology of perception. In Western Europe, we are already engaging in a quite consistent and standardised strategy. Moreover, at the moment, there are also overseas and the former Eastern countries, which both have a somewhat different strategy.
KS: In your opinion, what are the ANTO’s improvement opportunities in general, and what are the goals for the ANTO here in Sweden?

MT: With only two employees in our Stockholm office, we are rather short-staffed. There is an index, the Global Market Performance Indicator GMPI, which analyses various countries and calculates key performance figures, indicating how much potential a market like Sweden will have in the future. In that index, Sweden is performing exceptionally well, in the following years the Swedes will have more income available for travelling. Hence, also within the ANTO Sweden is becoming more important and we will be given more resources. That means, for 2012 we are getting a higher marketing budget and we are hoping that in the near future we will also see a personnel-related build up. In this regard, I definitely see high potential for improvement, there is still potential to be exploited.
Examples of images used for the current marketing campaign of the ANTO “It’s got to be Austria”

Source: Österreich Werbung, 2011f