



Destination brand positions of a competitive set of near-home destinations

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ABSTRACT

Although the branding literature commenced during the 1940s, the first publications related to destination branding did not emerge until half a century later. A review of 74 destination branding publications by 102 authors from the first 10 years of destination branding literature (1998–2007) found at least nine potential research gaps warranting attention by researchers. In particular, there has been a lack of research examining the extent to which brand positioning campaigns have been successful in enhancing brand equity in the manner intended in the brand identity. The purpose of this paper is to report the results of an investigation of brand equity tracking for a competitive set of destinations in Queensland, Australia between 2003 and 2007. A hierarchy of consumer-based brand equity (CBBE) provided an effective means to monitor destination brand positions over time. A key implication of the results was the finding that there was no change in brand positions for any of the five destinations over the four year period. This leads to the proposition that destination position change within a competitive set will only occur slowly over a long period of time. The tabulation of 74 destination branding case studies, research papers, conceptual papers and web content analyses provides students and researchers with a useful resource on the current state of the field.

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1. Introduction

Ever since the brand literature commenced in the 1940s (see for example [Guest, 1942](#)), there has been consistent recognition that branding offers organisations a means for differentiation in markets crowded with similar offerings ([Aaker, 1991](#); [Gardner & Levy, 1955](#); [Keller, 2003](#), [Kotler, Brown, Adam, Burton, & Armstrong, 2007](#)). For destinations, effective differentiation is critical given the increasingly competitive nature of tourism markets, where many places offering similar features are becoming substitutable ([Pike, 2005](#)). For example, around 70% of international travellers visit only 10 countries, leaving the remainder of national tourism offices (NTOs) competing for 30% of total international arrivals ([Morgan, Pritchard, & Pride, 2002](#)). The pursuit of differentiation is explicit in brand definitions, which have most commonly been variations of that proposed by [Aaker \(1991, p. 7\)](#):

A brand is a distinguishing name and/or symbol (such as a logo, trademark, or package design) intended to identify the goods or services of either one seller or a group of sellers, and to differentiate those goods from those of competitors.

However, in the foreword to the first issue of *Place Branding and Public Policy*, editor [Simon Anholt \(2004, p. 4\)](#) suggested “almost

nobody agrees on what, exactly, branding means” in describing place branding practice as akin to the Wild West. There has been a lack of consistency in defining what constitutes destination branding, both within industry and within academia (see [Blain, Levy, & Ritchie, 2005](#); [Park & Petrick, 2006](#); [Tasci & Kozak, 2006](#)). The most comprehensive definition to date has been that proposed by [Blain et al. \(2005, p. 337\)](#), which followed [Berthon, Hulbert, and Pitt's \(1999\)](#) model of the functions of a brand from both the buyer and seller perspectives:

Destination branding is the set of marketing activities that (1) support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) serve to consolidate and reinforce the emotional connection between the visitor and the destination; and that (4) reduce consumer search costs and perceived risk. Collectively, these activities serve to create a destination image that positively influences consumer destination choice.

Branding is therefore considered mutually beneficial from both the supply and demand perspectives. Enhancing the ability of the brand to differentiate effectively can generate advantages for products and services, such as increased purchase intent ([Cobb-Walgren, Beal, & Donthu, 1995](#)), lower costs ([Keller, 1993](#)), increased sales, price premiums, and customer loyalty ([Aaker, 1991, 1996](#)).

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Advantages for destination marketing organisations (DMO) include increased potential to differentiate against places offering similar benefits, increased destination loyalty and increased yield for stakeholders such as local tourism businesses and travel intermediaries. Benefits for the traveller include ease of decision making through reduced search costs, reduced risk, and possibly enhanced brag value.

The focus of most research reported to date has been concerned with the development of destination brand identities and the implementation of campaigns (see for example, Crockett & Wood, 1999; Hall, 1999; May, 2001; Morgan, Pritchard, & Piggot, 2002). One area requiring increased attention is that of tracking the performance of destination brand positions over time. That is, the extent to which destination brands' positioning and repositioning campaigns have been effective in enhancing brand equity consistent with that intended in the brand identity. This is an important gap in the tourism literature, given: i) increasing competition (see Morgan, Pritchard, & Piggot, 2002), ii) the increasing level of investment by destination marketing organisations (DMO) in branding since the 1990s, iii) the complex political nature of DMO brand decision making and increasing accountability to stakeholders (see Pike, 2005), and iv) the long-term nature of repositioning a destination's image in the marketplace (see Gartner & Hunt, 1987). In terms of metrics for DMOs in general, a number of researchers in various parts of the world have pointed to a lack of market research monitoring effectiveness of destination marketing objectives, such as in Australia (see Carson, Beattie, & Gove, 2003; Prosser, Hunt, Braithwaite, & Rosemann, 2000), North America (Masberg, 1999; Sheehan & Ritchie, 1997), and Europe (Dolnicar & Schoesser, 2003).

The aim of this study was to track the brand positions held by a competitive set of near-home destinations between 2003 and 2007. For this purpose the efficacy of a hierarchy of consumer-based brand equity (CBBE) was trialled. CBBE was first promoted by Aaker (1991, 1996) and more recently by Keller (1993, 2003) to supplement traditional balance sheet brand equity measures. The rationale underpinning CBBE as a brand performance metric is that consumer perceptions of the brand underpin any financial estimate of future earnings estimated in the financial measure of brand equity. Since a financial balance sheet brand equity measure will be of little practical value to destination marketers, the concept of CBBE is worthy of consideration by DMOs. However, the potential of CBBE for destinations has only recently attracted the attention of academic researchers (see Boo, Busser, & Baloglu, 2009; Konecnik & Gartner, 2007).

2. Literature review

The first papers on branding appeared in the marketing literature during the 1940s (see for example Guest, 1942). The growth in interest in the field was evidenced during the second half of the 20th century, when an estimated 766 major publications by 789 authors were published (Papadopolous, 2002, in Anholt, 2002). The first journal article explicitly concerned with research relating to the branding of destinations was Dosen, Vransevic, and Prebezac's (1998) analysis of the appropriateness of Croatia's brand. During the same year, the first destination branding case study journal article, Pritchard and Morgan's (1998) analysis of the brand strategy for Wales, was published. Prior to this time research related to aspects of what is now regarded as destination branding had been reported, such as: destination image (for reviews see Gallarza, Saura, & Garcia, 2002; Pike, 2002), destination positioning (Chacko, 1997; Reich, 1997; Woodside, 1982), and destination slogans (see Klenosky & Gitelson, 1997; Pritchard, 1982; Richardson & Cohen, 1993). However, at the time these were not explicitly in the context of branding.

Gnoth (1998) suggested that the special track on 'Branding tourism destinations' he convened at the 1997 American Marketing Science conference, which attracted four papers, represented the first meeting of practitioners and academics on the topic. The following year, the Tourism & Travel Research Association (TTRA) conference, which was themed 'Branding the travel market', featured eight destination branding papers. In 1999 the conference of the TTRA's European Chapter, themed 'Destination marketing', featured a destination branding track. The 2005 initiative of Macau's Instituto De Formacao Turistica (IFT), in conjunction with Perdue University, to convene the first conference dedicated to destination branding, attracted 100 delegates from 22 countries. The conference was again staged in 2007, with the intent to hold the meeting biennially (see Dioko, Najarro, & So, 2005, 2007).

Destination branding texts did not emerge until the new millennium. The first were Morgan, Pritchard, and Pride's (2002, 2004) edited volumes of predominantly case studies and conceptual papers. These have since been followed by Donald and Gammack's (2007) research-based analysis of city branding for Sydney, Hong Kong and Shanghai in the context of tourism and film traditions, and Baker's (2007) practitioner perspective on branding for small cities in North America. Destination marketing texts that include destination branding chapters include Pike (2004a, 2008).

The first journal special issue on destination branding was published in the *Journal of Vacation Marketing* (1999, Vol. 5, 3). This has since been followed by *Tourism Analysis* (2007, Vol. 12, 4). Also, a special issue on place branding was published in the *Journal of Brand Management* (2002, Vol. 9, 4–5).

Given the increasing level of interest in this emerging field, it is timely to review the nature of the first 10 years of research published. The purpose of the review was to analyse the range of topics covered in refereed journal articles and edited book chapters, and in doing so identify potential research gaps. Conference papers are not included. The focus of the paper is the field of tourism destination branding, as opposed to place branding per se. It has been argued that branding destinations for tourism purposes limits inclusivity of the wider range of stakeholders of place (see for example Kerr, 2006), although Gnoth (2002) developed a model for leveraging export brands through tourism destination branding. This paper does not include place branding research publications, for which the journal *Place Branding and Public Diplomacy* was launched in 2004. The field of place branding encompasses a broader scope outside tourism, such as public policy, export trade, economic development, historical, sporting and cultural dimensions of which nations are constituted. For a brief overview of the emerging place branding literature, see Dinnie (2004), who argued academics have been slow to follow what has been a practitioner-led domain.

The literature search identified 74 destination branding publications by 102 authors, published between 1998 and 2007. These were categorised as: i) case studies, ii) conceptual papers, iii) research-based papers, and iv) web content analyses. The most popular type of destination branding paper has been cases. Such cases are valuable for bridging the 'divide' (see Pike, 2008, pp. 7–8) that exists between tourism practitioners and academics. In this regard, Simon Anholt (2004), editor of *Place Branding and Public Diplomacy*, who is also an experienced branding practitioner, has described the real world of international branding as a "bloody business", in comparison to the academic perspective. Table 1 summarises 33 papers that can generally be categorised as case studies. It should be noted that these papers are not necessarily reporting a rigorous case study methodology as proposed by Yin (2002). Nonetheless, one of the strengths of this section is the collection of papers written from the practitioner perspective. These provide rich insights to the real world of brand development

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