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Research paper

Destination image: Identifying baseline perceptions of Brazil, Argentina and Chile in the nascent Australian long haul travel market

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ABSTRACT

While the popularity of destination image research has increased exponentially in the literature, there has been relatively little published about perceptions held by international consumers of destinations in South America. The purpose of this paper is to report the findings of a research project that aimed to identify the baseline market perceptions of Brazil, Argentina and Chile amongst Australian residents, at the time of the emergence of this long-haul market. Of interest was the extent to which Australians differentiate the three distinct countries versus perceiving the continent as a gestalt. These baseline perceptions enable the effectiveness of future marketing communications in Australia by the three national tourism offices to be monitored over time. Importance-performance analysis is used as a practical analytical tool to guide decision makers. In terms of operationalising destination image, a key research finding was the very high ratio of participants using the 'Don't know' option for each destination performance scale item. This finding has practical implications for the destination marketers, as well as for researchers engaged in destination image research in long-haul and/or emerging markets.

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1. Introduction

Despite a call during the 1970s for research investigating international travel demand to Latin America (Jud & Joseph, 1974), there has been a lack of tourism research published by academic institutions in that part of the world (Rezende-Parker, Morrison & Ismail, 2003). In particular, little has been reported about the perceptions held of South American destinations by international travellers. This is surprising given the field of destination image research has been one of the most popular in the tourism literature, since the first studies proposed the relationship between image and destination competitiveness in the 1970s (see for example Hunt, 1975). The case for more destination image research related to South American destinations is timely and compelling given the continent's stabilising political situation, growth in international trade, and major investments in infrastructure (see Santana, 2000), along with mega- events such as the 2014 FIFA World Cup and 2016 Olympic Games drawing increased international media attention and visitors.

It has been suggested the South American continent might be regarded by many international travellers as a gestalt. That is to say, the continent might be thought of as a distinct destination with few perceived differences between the 12 separate countries

(Rezende-Parker et al., 2003; Shani, Wang, Hudson, & Gil, 2009). There are many discrete differences between these countries, such as language, topography, superstructure, climate, history, heritage and culture. However, it is posited that a gestalt is a possibility in some emerging long-haul markets. Underpinned by this proposition, this research was interested in Australian consumers' perceptions of Brazil, Argentina and Chile, which have been acknowledged as the top three destinations actively targeting long-haul international travel arrivals to the region (see Sobral, Peci, & Souza, 2007). In 2008, the first South American/Australian free-trade agreement was established with Chile, and QANTAS launched the first direct air link between Sydney and Santiago (Fraser, 2009). Around the same time, Brazil, Argentina and Chile began tourism marketing campaigns in the Australian market (LATAM, 2012). Table 1 shows the small but growing demand for travel by Australians to the three South American destinations of interest increased by 300% between 2002 and 2012.

Short-term international travel departures by Australians more than doubled from 3.461 million in 2002 and to 8.219 million in 2012 (ABS, 2013). The strong growth in outbound travel by Australians has been attributed to the Australian government's economic stimulus packages of 2008 and 2009, the introduction of low-cost air carriers, and the high value of the Australian dollar (Bianchi, Pike, & Lings, 2014). Indeed Australians' increasing propensity for international travel is partly responsible for the country's estimated \$5 billion tourism trade deficit (Tourism Research

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Table 1
Short-term Australian resident departures to South America 2002 and 2012.
Source: ABS (2013).

	2002	2012
Brazil	5400	17,800
Argentina	5000	15,900
Chile	5500	14,600
Total	16,900	48,300

Australia, 2011). The median length of time spent overseas in 2012 was 15 days (ABS, 2013). The new direct air link between Australia and South America, along with the increasing outbound travel growth from Australia, will be attractive to National Tourism Offices (NTO) in South America. However, the Australian outbound market is fiercely competitive, with the top 10 most-visited destinations in 2012 accounting for two thirds of all Australian travellers: New Zealand, Indonesia, the USA, Thailand, the UK, China, Fiji, Singapore, Malaysia, and Hong Kong (see ABS (2013)).

The aim of this study was to benchmark perceptions held by Australian consumers of Brazil, Argentina and Chile in 2012. It was felt this would provide two practical benefits. First, these baseline perceptions at the time of the emergence of the Australian market would enable monitoring of future marketing effectiveness over time by the NTOs in these three countries. Second, the data would identify the extent to which Australians perceptually differentiate the three destinations relative to South America as a gestalt.

2. Literature review

2.1. Perceptions of South America

Relative to other parts of the world there has been a lack of published English-language academic research relating to perceptions of South American destinations. Costa and Bauer's (2001) review of the literature did not find any studies investigating perceptions of Latin America. Only two of the 262 destination image studies published between 1973 and 2007, which were tabled by Pike (2002, 2007), were concerned with destinations in South America. Brown (1998) was primarily concerned with perceptions held of African destinations by German and British travellers, which were examined in comparison to Latin American and Caribbean destinations. However, it not known which South American destinations were included in the study, as Brown did not define the Latin American region, which might or might not have included destinations in Central and/or South America. Rezende-Parker et al. (2003) undertook an exploratory analysis of the image of Brazil as a destination in the US market. They attributed the lack of research into perceptions of Brazil for example to: (i) disinterest, up to that time, of the Brazilian government and private-sector stakeholders in marketing the destination offshore, and (ii) the paucity of academic institutions in the country with an interest in tourism as an economic activity.

A 2001 issue of the *International Journal of Hospitality & Tourism Administration* (Vol: 3/4) featured nine papers related to tourism issues in Central and South America. While none of these studies investigated South America destination image from the consumer perspective, Costa and Bauer (2001) explored perceptions held of 'Latin America' by Australian travel intermediaries. Their survey of 54 Melbourne-based travel agents and ten tour operators found a general lack of awareness of attractions as a key barrier to growth. They noted at that time the political situation had been relatively stable for a decade, there were no countries under military dictatorship, and economies were expanding quickly. They proposed most Australians were ignorant of the improvements and probably

still held negative perceptions. In the emerging destination branding literature, none of the 74 publications from 1998 to 2007, tabled by Pike (2009), were explicitly concerned with any destinations in the South American continent.

2.2. Gestalt

In spite of Brazil's geographic proximity to the USA, and USA travellers being the highest spenders with the longest length of stay there, Rezende-Parker et al.'s (2003) participants were unable to differentiate between Portuguese-speaking Brazil and Hispanic-speaking South American destinations. Therefore, even though South America is a large land mass with 12 countries, the continent might be perceived as one distinct destination (Shani et al. 2009). The concept of a gestalt image was first raised in the marketing psychology literature by Reynolds (1965), who suggested such a composite image can be developed by consumers based on simple inferences or a single fact. Reynolds proposed this often occurs through plot value, where certain attributes are seen by an individual to go together, and thus individuals construct a plot from a small amount of knowledge. The proposition underpinning this research was that it might be expected at the time of the study that Australians probably only had a small amount of knowledge about the destinations of interest. Key reasons for this include: lack of promotion by NTOs; no major trading agreement prior to 2008; a lack of any regular sporting competition with countries in the continent (until the 2014 admission of Argentina into the annual winter rugby union championship with Australia, South Africa and New Zealand); language barriers; lack of immigration movements enabling the development of migrant communities; and, the lack of direct air routes, and therefore higher transport costs, for what represents long-haul travel from Australia.

2.3. Long-haul travel

The term *long-haul travel* has been widely used in the vernacular of travellers and the travel trade, at least since the advent of jet aircraft in the late 1960s. Interestingly however, even though there are a numbers of different streams of research interest in the topic, such as airline business models (see Wensveen and Leick, 2009), travel demand elasticity (see Crouch (1994)), airline economics (see Graham, Kaplan, & Sibley (1983) and medical issues such as deep vein thrombosis (see Cesarone, Nicolaidis, De Sanctis, Myers, & Winford, 2002; Ferrari, Chevallier, Chapelier, & Baudouy, 1999; Scur, Machin, Bailey-King, Mackie, McDonald, & Smith, 2001) and climate science (see Smith and Rodger, 2009), there is not yet a widely accepted definition in the academic literature. Operational definitions have either been based on flying time, such as four hours (Ferrari et al., 1999), five hours (Boerjan, 1995; Medlik, 1996), six hours (Bowen, 2001), and eight hours (Scur et al., 2001), or distance such as 3000 miles (Bowen, 2001) or 3700 km (Smith & Rodger, 2009,) which Higham and Cohen (2011) termed *extreme long-haul* travel. Little research has investigated the traveller perspective (see McKercher and Lew (2003)), which might be expected to be influenced by factors such as experience and socio-cultural context (Pike & Page, 2014). Regardless of these issues, travel from Australia to South America is most definitely long-haul, given the flight distance from Sydney to Santiago, the closest gateway airport of the three countries, is approximately 11,000 km with a direct flight time of 16 hours.

2.4. Destination image measurement

The field of academic destination image research commenced in the early 1970s (see, for example, Anderssen & Colberg, 1973;

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