TOURISM COMMUNITY VIEWS ON DESTINATION POSITIONING: A CASE STUDY

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ABSTRACT

Research efforts, relating to the positioning of tourism destination, have centred upon understanding the attributes related to the destination under study. This has assisted us to understand how a destination may be preferred to competing destinations on the basis of one or more preferred attributes. To date research efforts have been tourist centric. A single case study method was employed to investigate how the tourism community views the positioning of their destination. Results indicated that tourism community buys-in to the destination positioning enabling a cohesive message to be communicated to targeted tourists. Using an alternate research method this paper extends our understanding identifying an alternate method that can be used to identify the criteria that are important to tourists.

Keywords: Positioning, case study, tourism, destination

INTRODUCTION

Tourism is the world's largest industry and creator of jobs. Research indicates that in 2006 tourism generated, directly and indirectly, 10.3 per cent of global GDP and nearly 235 million jobs in the world-wide economy (World Travel and Tourism Council 2006). Today, tourism marketers are faced with a complex environment resulting from unprecedented growth in the tourism industry over the last fifty years. Destination choices available to consumers have proliferated (Pike 2005). Furthermore, today's consumers, facilitated by increased leisure time, rising levels of disposable income and more efficient transportation networks, have the means to choose from this increasing array of tourism destinations. As a result, today's tourism marketers must influence consumer decision making in a complex and competitive global marketplace.

To survive in an increasingly competitive environment tourism marketers require an effective destination positioning strategy. In order to be successfully promoted in chosen target markets, a destination must be favourably differentiated from its competition, or positively positioned, in the minds of the consumers (Hankinson 2004; Javalgi, Thomas & Rao 1992). Research into the differences between high and low performance, in terms of marketing practice, indicates that to be successful over the long term offerings must be well "positioned" in the marketplace (Brooksbank 1994, p 10).

Destinations that recognise the importance of tourism require strategies that promote the destination effectively to tourists. The importance of positioning as a basis for developing marketing strategy is widely acknowledged (e.g. Botha, Crompton & Kim 1999; Crompton, Fakeye & Lue 1992; Trout & Ritvin 1995) and there has been a good deal of research into tourism destination positioning. This research has assisted us to understand which attributes attract tourists to destinations studied. To date, research efforts have largely centred upon identifying how a destination is perceived by tourists (e.g. Botha et al. 1999; Echtner & Ritchie 1991; Ibrahim & Gill, 2005; Javalgi et al. 1992; Kozak & Rimmington 1999). Alternate views are emerging in the literature. Recently, Hankinson (2004; 2005) considered positioning collecting views from destination marketing organisations (DMO's). Tourism is a complicated setting involving a diverse group of active stakeholders (Pike 2005). Researchers have not considered how the tourism community believe their destination is positioned. This paper will contribute to the literature by presenting one tourism communities views of their position in the marketplace. .

This paper considers what is currently known about positioning in the tourist context and then contributes by presenting one tourism communities views of their position in the marketplace. This paper uses a qualitative methodology to gain insights into tourism community views.

LITERATURE REVIEW

The positioning of a destination is the process of establishing a distinctive place of that destination in the minds of potential visitors (Gartner 1989). Positioning is more than merely promotion because it involves considerations of pricing, distribution and the nature of the product offer itself (Knowles & Curtis 1999). From a destination perspective, positioning is defined as the way a destination is defined by tourists on important attributes (Crompton et al. 1992). The main objective of positioning is to create a distinctive place in the minds of potential tourists, so that they know how a destination differs from competitive destinations, and how one destination could satisfy their leisure needs in comparison to other alternative destinations (Botha et al. 1999). Destination marketers, therefore, must know the perceived strengths and weaknesses of their own and competing tourist areas (Baloglu & McCleary 1999).

If a tourist destination fails to create a distinctive place, the consequences may include: increased direct competition from stronger competitive destinations, confusion among marketers about the needs and wants of target markets, and a fuzzy perception of the opportunities available at the destination (Kim, Chun & Petrick 2005). Whilst a destination may have excellent attributes such as climate and lifestyle, the destination needs to be positioned on attributes that are firstly meaningful to tourists and secondly provide the destination with a competitive advantage when compared with other tourism destinations (Botha et al. 1999; Chandra & Menezes 2001). The tourist may then choose a destination with the attributes that are perceived as the most attractive. Jayawardena (2002) further points out that the future of tourism markets is dependent on the ability of tourism countries to deliver a high quality product that corresponds to the changing taste, needs, wants and demands of the international traveller.

As noted by Kim, Chun and Petrick (2005) there are many studies in the tourism context exploring the positioning of a tourism destination. Some studies have been examined within the context of tourism destination image studies (e.g. Gartner 1989; Hu & Ritchie 1993) or the attributes of a destination such as a city (Botha et al. 1999), tourist attraction (Crompton et al. 1992; Kim 1998), state (Chen & Uysal 1992; Uysal, Chen & Williams 2000) and country (Haahti 1986; Kozak & Rimmington 1999). Selected studies are listed in Table 1.

Table 1
Summary of previous Research on Positioning at a destination

Author	Study Aim	Number in Study	Key Conclusions
Baloglu & McCleary (1999)	Compared US international pleasure travellers' images of four Mediterranean destinations (Turkey, Egypt, Greece and Italy)	448 US citizens	Visitors rated Italy, Greece and Turley as more positive than Egypt on all of the affective variables. Additionally, both Italy and Turkey were seen as more pleasant and exciting than Greece
Botha et al. (1999)	Develop a new competitive positioning strategy for Sun/Lost City	302 visitors to the resort	The differentiating destination attributes were entertainment, excluding cultural activities, with gaming, indoor recreational activities, and golf being recognised as especially strong elements; and infrastructure
Chen and Uysal (2002)	Analyse the market position of Virginia compared to eight other U.S states and Washington D.C.	1st phase- 8000 US residents. 2nd stage- 1318 US residents	Virginia and Pennsylvania offered similar nature-related activities such as snow skiing and visiting historical Civil War sites. Virginia, Florida and Washington were perceived as being the least competitive attractions
Crompton et al. (1992)	Motivation comparisons of long-stay winter visitors to the Rio Grande Valley in Texas	586 visitors to the Rio Grande in Texas	Destination marketers need to differentiate the attributes of other destinations from those of their own destination as well as understand the strengths and weakness of their destinations
Gartner (1989)	Explore the competitiveness of four U.S. states (Colorado, Montana, Utah and Wyoming)	Approximately 3000 US households	Respondents perceived Montana and Wyoming to be outdoor recreation areas with natural resources, whereas Utah and Colorado were perceived to be more toward cultural resources
Haahti (1986)	Investigated the relative positions of 11 European countries as summer holiday tourism destinations using images of the 11 countries as perceived by Scandinavians, Dutch, Germans, and Swiss respondents	681 foreign visitors	It was found that Dutch respondents showed a high tendency to perceive Germany and Holland as similar in image. In addition, Dutch respondents also believed that the two countries had higher levels of *a cultural experience*' and *accessible* attributes
Hu & Ritchie (1993)	Examine destination attractiveness according to different types of vacation experiences	400 Western Canada citizens	Attractive attributes includes scenery, climate, food, availability/quality of accommodations, shopping, local transportation
Kim (1998)	Identify the positioning of five Korean destinations (Cheju Island, Gyeongju, Sulak Mountain, Haeundae Beach, and the Yusung area)	400 tourists visiting the five locations	Gyeongju was ranked first and the Yusung resort area was ranked last on all six-attribute vectors. The images of both Gyeongju and Cheju Island were perceived to be similar, with both positioned on all attribute vectors higher and more positively than other destinations
Kozak and Rimmington (1999)	Explore UK respondents perceptions of 18 Turkish destinations (in comparison to other European countries)	600 British tourists visiting Turkey	Turkey was most competitive in the areas of local people friendliness, value for money, safety and security, and local transport. Turkey was rated lower for cleanliness of beaches, quality of accommodations, and sports facilities
Uysal et al. (2000)	Explore the competitiveness of Virginia as a tourism destination with 10 other States in America	1318 US households	Virginia was most competitive with Pennsylvania, North Carolina, and West Virginia in terms of natural features and with Pennsylvania, Maryland, South Carolina, and Georgia on historic and cultural heritage attributes

From reviewing the above studies, it can be concluded that most of the positioning strategies emphasising image and attributes have focused on comparing the attributes of a destination with like attributes from competing destinations (e.g. Chen & Uysal 2002; Kim 1998; Kozak & Rimmington 1999; Uysal et al. 2000). These studies argue that certain destinations are perceived more favourably than other destinations due to one destination performing more highly on the preferred attributes. One destination may also have destination attributes that are highly popular and advantageous that another destination does not. Of interest is that there have been no known studies that have aimed to identify the current positioning of a regional coastal destination as perceived by the local tourism community, comprised of tourism operators and destination marketing organisations (DMO's). This study aims to contribute to the literature by identifying how tourism operators at a coastal destination believe their destination is positioned.

RESEARCH APPROACH

A case study with semi-structured interviews was used to identify how tourism operators position their destination. The case study approach has been widely used by researchers seeking to understand marketing phenomena (e.g. Agarwal 2002; Awaitefe 2004). This technique permits researchers to investigate complex issues in some depth (Yin 2003). A single case study was deemed most appropriate to ensure an in-depth understanding of positioning from a tourist operator perspective (Lee 1999). An embedded rather than a holistic case study design was chosen to exhibit maximum variation (Perry 1998) within the one region. By using an embedded case study, the research will also identify sub-units which allows for a more detailed level of enquiry (Yin 2003).

Twelve semi-structured interviews were held with tour operators, including accommodation providers, activity operators and the DMO. This provided a thorough overview of tourism at the regional destination under study. Each of these representatives was employed in tourism and was knowledgeable about how the destination is marketed to tourists. These representatives have also conducted marketing research using techniques such as interviews on their own tourists so their judgements were useful. Due to human resource constraints, one interview was conducted at eleven of the twelve organisations. Case C, which was a larger organization and not as constrained with human resources, allowed two interviews to take place with employees from their organisation. The interviews were conducted during March and April 2007. Respondents gave permission for their interview to be recorded after confidentiality of responses was assured. Interviews averaged 40 minutes and were recorded and transcribed for analysis. In total 362 pages were analysed. Prior to analysis, responses to each question were entered into an Excel spreadsheet. The data analysis employed qualitative procedures aimed at identifying topics and sub-topics relating to destination positioning. Statements were coded using an open and secondly an axial coding scheme as recommended by Strauss and Corbin (1988). Each case was allocated an alphabetical label to ensure confidentiality.

THE DESTINATION

A regional tourism destination in Queensland was chosen for this study. As Queensland's second largest export earner, tourism contributes significantly to the economic well being of the state (Tourism Queensland 2007b). Tourism Research Australia figures reveal that international visitors spent more than $3.5 billion across all of Queensland in 2006 - up 10.3 percent from the previous year (Fraser Coast South Burnett Weekly Update 2007). Tourism also employs 7.3% of the State's workforce (Office of Economic and Statistical Research 2006).

The Fraser Coast was selected for this study because it was the best performing region[1] in Queensland in terms of percentage growth with International visitor spending increasing by 30 per cent to $68 million in 2006 (Fraser Coast South Burnett Weekly Update 2007). The Fraser Coast has the position tagline of *perfect by nature* as pictured below.

Fraser Coast
perfect by nature

The destination positioning statement for the Fraser Coast is "A diversified holiday destination offering a nature based, relaxed and friendly experience" (Tourism Queensland 2007a). The attributes that are used by Tourism Queensland to appeal to potential tourists include 1) World

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[1] Brisbane outperformed the Fraser Coast region in 2006.

Heritage listed Fraser Island, 2) warm sunny weather, 3) a variety of accommodation styles, 4) whale and dolphin watching tours and activities, 5) 4WD adventures and 6) the opportunity for beach island and country experiences.

Internationally, the Fraser Coast is positioned in close proximity to Brisbane and the Gold Coast to ensure the Fraser Coast is a destination promoted as offering the opportunity to experience the world-class beaches, sand dunes and rainforest of the World Heritage-listed Fraser Island, the migration of whales, and reef and diving opportunities of the Southern Great Barrier Reef (Tourism Queensland 2007b).

Hervey Bay was chosen as the focal point for this study because if offered maximum diversity. Hervey Bay is the only place on the Fraser Coast that offers accommodation ranging from camping facilities to 5 star resorts (Tourism Queensland 2007b).

RESULTS

Tourism operators were asked to discuss how the destination is positioned. Prompts were used to elicit responses Due to confidentiality concerns about the details of their businesses; questions were not asked that dealt with each operator's specific positioning strategy. Rather the focus was on how they believe the destination is positioned. It was concluded that all respondents understood that Hervey Bay is positioned as part of the Fraser Coast region rather than as an entity itself. For example, Case L has stated that it's not *Hervey Bay. It's about a combined destination. The Fraser Coast is basically Hervey Bay, Fraser Island and, and the Maryborough area*. The 13 respondents understood that the destination is positioned by the Fraser Coast South Burnett Regional Tourism Bureau, which is the DMO.

It was determined that 10 of the 13 respondents were able to identify either the key positioning statement or aspects of the regional positioning strategy of the Fraser Coast. Two of the respondents were unsure and Case K argued that the Fraser Coast is promoted as a *good family destination*. In total eight of these respondents identified *Nature* as how the Fraser Coast is currently positioned. Four of the respondents, Case C1, F, G and H correctly stated the *Perfect by Nature* Fraser Coast slogan which is promoted in media such as destination brochures, television and billboards. Case C1 argued that the focus is on nature as *we haven't got theme parks. You haven't got big man made attractions. It's a safe place with lots of opportunities to explore nature*. The remaining six respondents gave responses dealing with nature. For example, Case A argued that the Fraser Coast is positioned as the *premier nature-based destination in Australia* and Case L stated it is *Australia's premier nature-based aquatic playground*. It was also determined that major attractions under the jurisdiction of Hervey Bay were perceived as part of the Fraser Coast's positioning strategy by respondents. Case E mentioned the destination is positioned as *the gateway to Fraser Island. Also the whale capital of the world*. Case K considered the *safe beach environment and Fraser Island* as part of the positioning strategy. It was noted that most respondents were unable to divulge the positioning of the destination much further than providing the slogan. For example, Case F commented on the positioning by stating that it is *a hard one as I don't really do any research. But the tourism board sends out the message 'perfect by nature' and that's what we really want to promote.* Case G also suggests that they are *not sure. Haven't looked at it from that point of view.* Case D, who didn't know the slogan, suggested that *you might need to talk to the tourism board about that. That's probably more their area where they have access to all the figures from up and down the coasts.*

It was determined that of the 10 respondents that were able to identify the positioning strategy of nature on the Fraser Coast, 9 of them considered this matched the positioning of their

organisation. Only Case G stated that the positioning was *irrelevant* to their type of organisation. This organisation was more interested in outbound travel. Of the nine respondents, Cases E, L and A provided reasons why focusing on nature in positioning is relevant. Case E stated that *it's really what the majority of people come to see* and Case F argued that *it matches the positioning of the organisation as we have nature directly in front of us*. Case F argued that *it matches the positioning of the organisation as we have nature directly in front of us*. Case A commented that *there is no point in us marketing something that we cannot deliver on [nature]*.

The tourism operators were asked to provide some insight into how they believe tourists perceive Hervey Bay. They indicated that tourists expressed mixed views about Hervey Bay with negative and positive insights shared. *Fraser Island* was the main reason why tourists perceive Hervey Bay positively with 6 responses. For example, Case G stated that *people are blown away by Fraser Coast's World Heritage* and Case J stated that tourists *are impressed by the place*. Case J also stated that tourists are *looking forward to Fraser Island and doing a trip to Fraser. And they are impressed by the place*. Whilst Fraser Island is separate from Hervey Bay, it appears to be treated by tourism providers as part of the destination. For example, Case E mentioned that Hervey Bay is considered *the gateway to Fraser Island*. Case D also furthered the importance of Fraser Island by stating that *I think nearly any ad that you see in Hervey Bay. Nearly all the ads have got a shot of Fraser Island, Lake MacKenzie. That's the big drawing power*.

The *Beach* was also deemed to be of importance to tourists travelling to Hervey Bay with the safety of beaches viewed favourably by many tourists. For example, Case I stated that *it is a safe beach with no big breakers and so forth. So they can let the kids play without worrying about it*. Case F similarly argued that *the beaches, they are stinger free*. The next highest response was *Whales* with 3 responses. For example, Case K argued *where else can you go and see whales play like they do?* Interestingly, whilst this is considered a major tourist attraction by Tourism Queensland, whale watching was not mentioned as frequently as Fraser Island and the safe beaches.

Other aspects that were mentioned infrequently included the relaxed lifestyle, nice place, weather and untouched lifestyle. *Relaxed lifestyle* was a minor response identified twice with both Cases C2 and I simply listing that tourists have a positive perception of the easiness of life in Hervey Bay. A *Nice place* is a response also listed twice. For example, Case B argued that *it's a nice place. It's not too busy. It's nice and clean*. Hervey Bay is perceived as a good *Natural Environment* by two respondents. Case C2 indicates that *it is perceived as a good natural environment* whereas Case F stated *that Hervey Bay is largely untouched*. On a final note, the *Weather* was the final reason why tourists perceive Hervey Bay as noted by two respondents.

Negative comments by tourists related to the limited attractions and lack of shopping available in Hervey Bay. Five respondents argued that Hervey Bay has limited attractions. For example, Case G stated that Hervey Bay is *restricted to Fraser Island. You know there isn't a lot else at the moment to attract people here*. Case I similarly argued *when you've done the whales, what do you do next?* Another limitation is the *lack of shopping* listed by 4 respondents. For example, Case K stated that tourists *are disappointed with relation to the amount of shopping that is available*. A final limitation identified by 4 cases was that Hervey Bay needs to target tourists with more money. For example, Case C1 stated that *we need the higher yield visitors who are going to spend some money while they are here*. However, Case G believed this will not happen at the moment because the *yuppie market, the people who, say, will spend $1000 for three nights aren't going to come to Hervey Bay, because they don't have all the service and facilities they want*. It is of interest that these limitations could be related. As people with a higher income may be more likely to spend money on attractions and shopping than a family on a budget, the

lack of these attributes may indicate why Hervey Bay does not attract the higher income market. Whilst Hervey Bay now offers four star and five star accommodation *to suit everyone* (Case B), tourism operators noted that attention must be directed towards increasing the number of attractions and shopping to supplement their tourism experience.

DISCUSSION

Tourism operators can provide a holistic view of a destination positioning. The case study method employed in this study yielded insights into how tourism operators perceive that their destination is positioned. To date, positioning research has used a consumer viewpoint (e.g. Botha et al. 1999; Chen & Uysal 1992; Crompton et al. 1992; Gartner 1989; Haahti 1986; Hu & Ritchie 1993; Kim 1998; Kozak & Rimmington 1999; Uysal et al. 2000). Whilst such endeavours provide an overview of how tourists perceive the destination, alternate methods can be used to identify important attributes. In this research a case study method involving semi-structured interviews was used to identify the range of attributes that describe the destination studied. This contributes to the literature about how an alternate research method can be used to identify attributes that are used by tourists travelling to a destination

Research (e.g. Sheehan, Ritchie & Hudson 2007) suggests that a collaborative strategy works when promoting a tourism destination. In this study the destination was positioned by the regional tourism body on one key attribute, namely 'perfect by nature' and the tourism community expressed a view that was largely consistent with the message promoted by the DMO.

The majority of studies take a comparative view-point comparing the image of different destinations (Baloglu & McCleary 1999; Gartner 1989) or the competing attributes that are shared by competing destinations (e.g. Kim 1998; Kozak & Rimmington 1999; Uysal et al. 2000). These studies can provide insights into consumer preferences for one destination in comparison to the competing destinations studied allowing a preference or rank order of destinations to be generated by the researchers. A single point of view can assist researchers to isolate the unique attributes that distinguish the destination under study from other destinations. This permits researchers to consider how destinations can be differentiated.

CONCLUSIONS

This paper demonstrates that alternative research methods (e.g. a qualitative methodology in the form of semi-structured interviews) and consideration of alternate stakeholder views (e.g. the tourism community) can be used to understand phenomena. It was identified that the tourism community expressed views that were largely consistent with the key positioning message communicated by the DMO. According to tourism operators Hervey Bay is positioned on nature with the major attributes of Fraser Island, beaches and whale watching being promoted in the advertising material.

IMPLICATIONS FOR MANAGEMENT

Interviewing tourism operators provides insights into the attributes that are valued by their current patrons. In this study tourism operators indicated that safe beaches with calm water and few waves were valued by their patrons. Despite its potential to attract tourists to the destination this attribute is not used currently in the marketing of this destination.

CHALLENGES AND DIRECTIONS FOR FUTURE RESEARCH

This paper considers one regional area in Australia. Future research is recommended to increase our understanding of how tourism operators perceive their destination to be positioned. Future research considering tourism operators' views is recommended for urban destinations, other regional locations and other countries. These endeavours would permit a more comprehensive understanding of the usefulness of considering the tourism communities views on positioning.

To date, consumer data has been used to determine how a regional destination is positioned. Whilst such endeavours provide an overview of the destinations position a dyadic approach could be utilised. A dyadic approach, where the tourism community views and tourist views are collected would enable researchers to compare tourism community and tourist perceptions. Such comparison would permit researchers to identify potential gaps or mismatches. Consideration of tourism community views is important because "DMO's lack control of delivery of the brand promise" (Pike, 2005, p. 259). As noted by Pike (2005) without buy in from these stakeholders strategies will flail. In our case it was clear that the tourism community bought into the DMO message. Cases of communities not buying-in to the DMO strategy are likely to exist and research into such communities is recommended to further build our understanding.

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