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**POSITIONING AS A SOURCE OF COMPETITIVE ADVANTAGE:  
BENCHMARKING ROTORUA'S POSITION AS A DOMESTIC SHORT  
BREAK HOLIDAY DESTINATION**

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# Abstract

Travellers are spoilt by holiday choice, and yet will usually only seriously consider a few destinations during the decision process. With thousands of destination marketing organisations (DMOs) competing for attention, places are becoming increasingly substitutable. The study of destination competitiveness is an emerging field, and this thesis contributes to an enhanced understanding by addressing three topics that have received relatively little attention in the tourism literature: destination positioning, the context of short break holidays, and domestic travel in New Zealand. A descriptive model of positioning as a source of competitive advantage is developed, and tested through 12 propositions. The destination of interest is Rotorua, which was arguably New Zealand's first tourist destination. The market of interest is Auckland, which is Rotorua's largest visitor market. Rotorua's history is explored to identify factors that may have contributed to the destination's current image in the Auckland market. A mix of qualitative and quantitative procedures is then utilised to determine Rotorua's position, relative to a competing set of destinations. Based on an applied research problem, the thesis attempts to bridge the gap between academia and industry by providing useable results and benchmarks for five regional tourism organisations (RTOs). It is proposed that, in New Zealand, the domestic short break market represents a valuable opportunity not explicitly targeted by the competitive set of destinations. Conceptually, the thesis demonstrates the importance of analysing a destination's competitive position, from the demand perspective, in a travel context; and then the value of comparing this 'ideal' position with that projected by the RTO. The thesis concludes Rotorua's market position in the Auckland short break segment represents a source of comparative advantage, but is not congruent with the current promotional theme, which is being used in all markets. The findings also have implications for destinations beyond the context of the thesis. In particular, a new definition for 'destination attractiveness' is proposed, which warrants consideration in the design of future destination positioning analyses.

# Glossary

ARC	Auckland Regional Council
BOP	Bay of Plenty
CAM	Commercial Accommodation Monitor
CSF	Critical success factor
DMO	Destination marketing organisation
FIT	Free independent traveller
GTB	Government Tourist Bureaux
IPA	Importance-performance analysis
KMO	Kaiser-Meyer-Olkin measure of sampling adequacy
MDS	Multi-dimensional scaling
NTA	National Travel Association (NZ)
NTO	National tourist office
NZMACI	New Zealand Maori Arts & Crafts Institute
NZTB	New Zealand Tourism Board
NZTD	New Zealand Tourism Department
NZTP	New Zealand Tourist & Publicity Department
PCT	Personal Construct Theory
PRO	Public Relations Office
RDC	Rotorua District Council
RPS	Rotorua Promotion Society
RTB	Regional tourist board
RTO	Regional tourism organisation
SCA	Sustained competitive advantage
TNZ	Tourism New Zealand
TIANZ	Tourism Industry Association of New Zealand
ToMA	Top of mind awareness
VIC	Visitor information centre
VIN	Visitor information network
VFR	Visiting friends or relatives

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# Chapter 1 - Introduction

Many if not most aspects of tourism take place at destinations. This assertion is usually implicit in definitions of 'tourism'. It is acknowledged that defining tourism is almost conceptually impossible (Holloway, 1994). Complications arise from the multidisciplinary and multi-faceted nature of tourism, as well as overlaps with the concepts of leisure and recreation. Therefore, definitions will usually vary according the discipline and context in which they are applied. Indeed, as has been pointed out (see for example Hall 1998, Leiper 1995), most tourism texts offer a different definition. Notwithstanding often subtle variations, what is evident in the range of definitions, examples of which are presented in Table 1, is that tourism is essentially concerned with aspects of people, travel and places.

**Table 1.1 Definitions of Tourism**

<b>Author</b>	<b>Definition</b>
Hunziker (1951, in Collier 1997, p. 2)	"...the sum of the phenomena and relationships arising from the travel and stay of non-residents, in so far as they do not lead to permanent residence and are not connected with any earning activity".
Ryan (1991a, p. 6)	"...holiday tourism may be defined as the means by which people seek psychological benefits that arise from experiencing new places, and new situations that are of a temporary duration, whilst free of the constraints of work, or normal patterns of daily life at home".
Mill and Morrison (1992, p. 9)	" <i>Tourism</i> is the term given to the activity that occurs when tourists travel".
Heath and Wall (1992, p. 4)	"Tourism usually denotes forms of recreation that take place beyond a specified distance from home or in an administrative jurisdiction different from one's place of permanent residence".
World Tourism Organization (1993, in Witt, Brooke and Buckley 1995, p. 2)	"...the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes".
Holloway (1994, p. 3)	"...someone who travels to see something different, and then complains when he finds things are not the same!"
Gunn (1994, p. 4)	"...tourism is defined as encompassing <i>all travel</i> with the exception of commuting" (italics as in original)
Hall (1998, p. 6)	"Tourism is a commercial phenomenon of industrial society which involves a person, either individually or in a group, travelling from place to place (the physical component of tourism), and/or journeying from one psychological state to another (the re-creating component of tourism)".
Sharpley (2002, p. 22)	"It is, in short, a social phenomenon which involves the movement of people to various destinations and their (temporary) stay there".

The thesis is concerned with the marketing of places, a field of study where 'tourism' may also be viewed as a representation of consumers' demand for travel related products (Middleton, 1994, p. 3): "Marketing is a subject of vital concern in travel and tourism because it is the principal management influence which can be brought to bear on the size and behaviour of this major market". From the marketing perspective, tourism features a negotiation between two forces – a supply-side and a demand-side (Murphy, 1985). Marketing has been described as an exchange process between the two (Kotler, Bowen and Makens, 1999, p. 12): "Marketing is a social and managerial process by which individuals and groups obtain what they need through creating and exchanging products and value with others". In the thesis the supply-side focus is places as tourism destinations, which range from countries to cities to purpose built resort areas (Laws, 1995), and are most commonly communities based on local government boundaries (Middleton, 1994). From a supply perspective, places offer structures that promise a range of experiences. The thesis is interested in destinations as represented by New Zealand Regional Tourism Organisations (RTOs), which are a mix of cities, rural districts or provincial regions based on political boundaries. At the time of writing, 25 RTOs are recognised by the Tourism Industry Association of New Zealand (TIANZ). While small in number, research into links between RTO strategy, structure, funding and decision-making will become increasingly relevant, given the economic importance of tourism to New Zealand regions. In Rotorua for example, which is the destination of interest for the thesis, tourism is the largest employer, providing direct full time employment at a ratio that is far higher than the world and New Zealand averages.

The Rotorua district is recognised as a domestic tourism icon, and its local government boundary is considered suitable for the purpose of the thesis. Indeed, destination studies are usually based on the administrative or political boundaries described above. However, it is important to consider whether such a boundary is relevant to travellers (Ashworth and Voogd 1990a, Ryan 1991a), since tourism is a combination of physical and social elements (Hall, 1998). On the demand side, a destination may be viewed as

both a physical space containing natural and built environments, as well as a mental space, relating to the traveller's desires, images and experiences. In this regard, it has been argued that tourism 'products' are not the destinations, but the experiences that take place there (Murphy, Pritchard and Smith 2000, Ryan 1991a): "A destination may be viewed as an amalgam of individual products and experience opportunities that combine to form as a total experience of the area visited" (Murphy, Pritchard and Smith, 2000, p. 44). Clearly then, for mutual satisfaction to occur at a destination, there should be a convergence between the marketer's place offerings and the individual traveller's desires, images and experiences, both at a physical and perceptual level.

From the destination marketing perspective, tourism is regarded as an important enabler of economic development for nations and communities. Few other industries have evolved as quickly as tourism has during the past few decades (Jafari, 1993), with the development of international tourism particularly impressive: "The substantial growth of tourism activity clearly marks tourism as one of the most remarkable economic and social phenomena of the past century" (World Tourism Organisation (WTO) ([http://www.world-tourism.org/market\\_research.htm](http://www.world-tourism.org/market_research.htm) 28/8/02)). The WTO reported international arrival numbers had increased from 25 million in 1950 to 699 million in 2000. This growth has appealed to developers and investors, with international arrivals increasing at an average rate of 6 per cent from the 1960s to the 1990s (Bull, 1995). The WTO suggested many countries now regard tourism as an indispensable source of foreign exchange, with international tourism and fare receipts estimated to account for at least 8% of global earnings on goods and services in 1999. The World Travel & Tourism Council (WTTC, 2002) forecast global tourism and travel demand to grow by an average of 4.5% per annum between 2002 and 2012.

Tourism, as a service industry, is labour intensive. In 2002, tourism employment has been estimated at one in every 12 jobs globally (WTTC, 2002). The recognition of the economic value of tourism activities to communities has spawned thousands of destination marketing organisations

(DMOs). As their title suggests, the focus of DMO operations is selling a place, with the desired end results being increases in visitor arrivals, length of stay and spend. The recognition that such increases lead to new job creation has seen tourism move from the shadows of fiscal policy to a place in centre stage (Hall, 1998).

Within the tourism market destinations are emerging as arguably the biggest brands (Morgan, Pritchard and Pride, 2002). However, it is suggested, in many competitive market places destinations are becoming increasingly substitutable, and therefore commodities rather than brands. The consumer-traveller is exposed to an enormous amount of promotional communication on a daily basis, whether in decision mode or not. Destination messages must compete for attention, with the right message at the right time. For many destinations maintaining competitiveness is now a major challenge (WTTC 2001, in Australian Department of Industry, Tourism and Resources 2001). The success of individual tourism businesses, as part of the 'amalgam' will depend to a large extent on the competitiveness of the destination. How then do destinations gain an advantage over the multitude of competition? In a recent report on destination competitiveness modelling, the Australian Department of Industry, Tourism and Resources (ADITR, 2001, p. 21) suggested knowledge was the key: "The important thing is that ideas and knowledge are key competitive factors. So knowledge-based tourism has become an important strategy with the advent of knowledge-based tourists and globalisation of tourism industry".

The thesis attempts a contribution to the emerging field of destination competitiveness, which has recently attracted increased attention. The 1990s and early 2000s have seen the appearance of texts focusing on the marketing of destinations (see Ashworth and Goodall 1990, Heath and Wall 1992, Law 1993, Nykiel and Jascolt 1998), destination branding (Morgan, Pritchard and Pride, 2002), the promotion of places (Ashworth and Voogd 1990b, Gold and Ward, 1994), and the management of DMOs (Laws, 1995). At least four academic conferences have focused on destination marketing. In 1990 the third international tourism workshop organised by the

Geographical Institutes of the University of Groningen and the University of Reading focused on selling tourism destinations (Ashworth and Goodall, 1990a). In 1996 the Fundacion Cavanilles for Advanced Studies in Tourism organised the Second International Forum on Tourism, themed “the future of traditional tourist destinations” (Buhalis and Cooper, 1998, p. 85). The Association Internationale d’Experts Scientific du Tourisme (AIEST) conference focused on the competitiveness of long haul destinations (Ritchie and Crouch, 2000b). The 1999 TTRA Europe conference was themed ‘Tourism Destination Marketing – Gaining the Competitive Edge’.

*Tourism Management* devoted a special issue to ‘The Competitive Destination’ (see Volume 21, Issue 1, 2000). The range of issues covered in the special issue demonstrated the complex nature of destination competitiveness analysis: sustainable competitiveness (Ritchie and Crouch, 2000), price competitiveness (Dwyer, Forsyth and Rao, 2000), managed destinations (d’Hautesserre, 2000), responding to competition (Kim, Crompton and Botha, 2000), the destination product and its impact on traveller perceptions (Murphy, Pritchard and Smith, 2000), the role of public transport in destination development (Prideaux, 2000), environmental management (Mihali, 2000), integrated quality management (Go and Govers, 2000), regional positioning (Uysal, Chen and Williams, 2000) and marketing the competitive destination of the future (Buhalis, 2000). Also, an issue on tourism and travel competitiveness in *Tourism* (Volume 47, Issue 4, 1999) featured three papers at destination level: price competitiveness (Dwyer, Forsyth and Rao, 1999), the role of Spanish public administration (Pedro Bueno, 1999) and the competitiveness of alpine destinations (Pechlaner, 1999).

Despite this activity, there has been no accepted competitiveness model developed to the extent of providing a comparative index between destinations. This has been attributed to the complexity of destination competitiveness:

*While economists have placed emphasis on price and the country-specific economic characteristics of competitiveness, the management and strategy people have focused on the firm-specific characteristics, while the focus of sociologists and political theorists has been on various social, political and cultural characteristics underlying the notion of competitiveness. Moreover, each group has suggested different indicators to explain or measure competitiveness (ADITR, 2001, pp. 33-34).*

The most comprehensive working model to date has been by Ritchie and Crouch (2000a), who presented a conceptual model of destination success characteristics, which they had been developing since 1992 (see also Ritchie and Crouch, 2000b). Their motivation was that while researching destination competitiveness was “tourism’s holy grail” (p. 5), the topic lacked attention from researchers. One of the key elements in the Ritchie and Crouch model was the proposed relationship between resources representing sources of comparative advantage and resource deployment to achieve competitive advantage. Ritchie, Crouch and Hudson (2000) suggested the key challenge ahead lay in developing operational measures of the proposed model’s components. Recognising this, and the previously mentioned ADITR (2001) assertion that the key to future destination competitiveness is knowledge-based tourism, the focus and contribution of the thesis lies in the investigation of operationalising destination positioning as a potential source of competitive advantage for DMOs: “Indeed, the importance of tourist’s perceptions is such as to warrant separate recognition in a model of destination competitiveness” (ADITR, 2001, p. 38).

The marketing of destinations differs from that for individual products and services in at least one significant way. DMOs have little if any direct control over the products in their territory. It is important to recognise that one function where DMOs may successfully exert influence is in destination promotion. However, while a region may have the goods, so to speak, to attract visitors, the destination risks not reaching its potential through poor promotion. Promotion is therefore an important component of the marketing mix for DMOs, but must be driven by a focussed positioning strategy. Positioning was first introduced to the advertising community as a marketing

strategy in 1969 (Trout and Ries, 1979), and has been defined as a process of “establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings” (Lovelock, 1991, p. 110). At the core of this quest for a distinctive place is recognition that marketing is a battle fought inside the consumer’s mind (Ries and Trout, 1986, p. 169):

*Marketing battles are not fought in the customer's office or in the supermarkets or the drugstores of America. Those are only distribution points for the merchandise whose brand selection is decided elsewhere. Marketing battles are fought in a mean and ugly place. A place that's dark and damp with much unexplored territory and deep pitfalls to trap the unwary. Marketing battles are fought inside the mind.*

Positioning theory is based on three propositions (Ries and Trout, 1986). First, we live in an over-communicated society, bombarded with information on a daily basis, at levels that are unprecedented in our history. Second, the mind has developed a defence system against the clutter. Third, the only way to cut through the clutter to the mind is through simplified and focussed messages. Consequently, not selecting a positioning strategy could lead to head-on competition with stronger brands, an unwanted position with little demand, a fuzzy position where distinctive competence is unclear, or no position, where the product is unheard of (Lovelock, 1991). Porter (1980) warned that being ‘stuck in the middle’, with no distinctive position, was the most dangerous place to be.

Positioning should guide all marketing decisions, since the process has the potential to generate the desired mutually beneficial relationship between the marketer and the consumer. This is because positioning is underpinned by the philosophy of understanding and meeting unique consumer needs. For the organisation, the value of positioning lies in the link it provides between the analyses of the internal corporate and external competitive environments. This is fundamental to the definitions of strategic marketing, which point to the matching of internal resources with environmental opportunities. For example, Wahab, Crampon and Rothfield (1976, p. 24) offered the following definition of tourism destination marketing:

*The management process through which the National Tourist Organisations and/or tourist enterprises identify their selected tourists, actual and potential, communicate with them to ascertain and influence their wishes, needs, motivations, likes and dislikes, on local, regional, national and international levels, and to formulate and adapt their tourist products accordingly in view of achieving optimal tourist satisfaction thereby fulfilling their objectives.*

Effective positioning offers the customer benefits tailored to solve a problem, in a way that is different to competitors (Chacko 1997, DiMingo 1998). The key construct in positioning is product image. However, positioning requires more than an understanding of what a product's image is in the mind of the consumer. While image is clearly important, positioning also requires a frame of reference with the competition. A position is a product's perceived performance, relative to competitors, on specific attributes (Lovelock 1991, Wind and Robinson 1972). However, most destination image studies have analysed only one destination in isolation (Uysal, Chen and Williams, 2000). While such studies enable an indication of satisfaction with a destination, a weakness of this approach is the inability to determine relative positioning against competing regions. The literature review for the thesis found that 75 out of 142 published destination image papers from the period 1973-2000 analysed the image of one destination in isolation.

Ries and Trout (1986) emphasised the need for marketers to think in terms of 'differentness' rather than 'betterness'. This has important tourism implications. For example, it has been suggested that few tourism products are unique (Murphy and Pritchard, 1997). Differentiation is critical for destinations since they will either become places of status or commodities, with the latter leading to increased substitutability (Gilbert, 1990). In this regard, Plog (2000) lamented the increasing sameness of most destinations around the world, due to the effects of globalisation. 'Modernity' has all but destroyed the opportunity for travellers to experience 'different' attractions (Dann, 2000). This standardisation of facilities enabled mass tourism by providing travellers with necessary familiarity: "As a result, countries become interchangeable in the tourist's mind. Whether he is looking for good beaches, restful forests, or old cities, it becomes relatively unimportant to

him where these happen to be found” (Cohen, 1972, p. 172). The effect has also been referred to as the ‘Coca-colonisation’ of destinations (Collier, 1997). Therefore effective differentiated positioning to stand out from the crowd can be a source of advantage (Kotler, Bowen and Makens, 1999). This is possible for any product (DiMingo 1988, Moutinho 1994).

The modern tourist is a sophisticated consumer, engaging in many travel-related decisions, including where to travel to. For any given holiday type, the traveller will usually have a large range of destinations to choose from. As a decision maker, the approach used will vary between travellers and may vary between travel situations (Mayo and Jarvis, 1981). Influencing these decisions is arguably the supply-side’s key goal. The fundamental marketing challenge faced by DMOs is to somehow match a large and diverse product range with the needs of a number of dynamic and heterogeneous markets. The desired market position, assuming one has been designed and articulated, must be presented to the market in a way that stands out from other attention-seeking messages of rival destinations and substitute products. If successful, such a position will establish the destination as top of mind in the target audience. Since top of mind awareness (ToMA) is an indicator of purchase preference (Axelrod 1968, Wilson 1981, Woodside and Wilson 1985), it follows that such a position in the mind offers destinations a potential source of competitive advantage.

One of the problems with this is the images held in the minds of consumers may bear little resemblance to those intended by the DMO, its suppliers or intermediaries. Therefore an investigation of attitudes held by consumers is a mandatory prerequisite for destination marketing planning. Such an approach denotes a market orientation, which, it has been argued, the tourism industry has been slow to adopt (Medlik and Middleton, 1973). In this regard, positioning studies have not been prominent in the tourism literature (Grabler, 1997a). In particular, studies of destination positioning have been rare (Uysal, Chen and Williams 2000, Heath and Wall 1992, Yau and Chan 1990). However, it must be acknowledged that product positioning is a relatively recent field of study. Although positioning had featured in the

economics literature as early as the 1920s (Myers, 1992), there had been little mention of the construct in the marketing literature until the 1970s (Wind and Robinson, 1972).

The literature contains a wealth of valuable information for DMOs. And yet it could be argued that practitioners, in New Zealand and overseas, have generally been slow to take advantage of academic theory relating to destination positioning. Admittedly the lack of convergence between tourism theory and practise is a contentious issue. However, it is suggested the thesis goes some way towards bridging this gap. For example, positioning should be a necessary part of a DMO's marketing planning. However, while theory on the topic abounds, there have been few previous studies of destination positioning reported in the tourism literature to guide practical decision making. The thesis describes the process used to determine the position of Rotorua, in the context of short break holidays, relative to a competing set of destinations. As indicated, a key DMO challenge is matching a multi-attributed product range in a focused manner that will attract the attention of, and be meaningful to, a heterogeneous marketplace.

It is proposed one positioning theme may not meet the needs of all market segments. Rotorua's positioning theme, used in all markets, is 'Feel the spirit Manaakitanga'. Of interest to the thesis therefore is an investigation of the congruence between this theme and the needs of one major market. The target market is Auckland, which is Rotorua's largest source of visitors, and meets the three conditions that have generally been recommended for effective segmentation, namely measurability, accessibility and substantiality (see Hooley and Saunders 1993, Lovelock 1991). In the process, efforts have been made to contribute to the marketing planning of five RTOs, through their involvement in two of the research stages. There has been little domestic travel research in New Zealand (Goh and Fairgray, 1999), and the thesis findings represent the first domestic short break information for each of the five RTOs involved. Conceptually, it is through the New Zealand and short break holiday contexts that the thesis attempts to provide a contribution to an enhanced understanding of the role of positioning in destination

competitiveness. The focus is analysing the congruency of supply-side and demand-side perceptions of place.

## Statement of Objectives

The purpose of the thesis is to identify the position of Rotorua as a domestic short break holiday destination in the Auckland market, and in doing so examine whether the position represents a source of competitive advantage. To enable this analysis five goals were developed:

1. To identify characteristics of New Zealand short break holidays, including:
  - characteristics of Aucklanders with a propensity for short breaks
  - salient attributes used to differentiate short break destinations, from both the demand-side and supply-side perspectives
  - the importance of key motivation themes prominent in the literature
  - identification of the leading ToMA destination(s)
  - identification of destinations in Aucklanders' decision sets
2. To identify the market position held by Rotorua, including:
  - identification of historical factors that may have contributed to the development of Rotorua's current image in the Auckland market
  - identification of intent to visit Rotorua for a short break
  - identification of the characteristics of respondents selecting Rotorua as ToMA destination
3. To determine whether Rotorua's market position represents a potential source of competitive advantage.
4. To identify the perceptual differences held of the competitive set of destinations, between non-visitors and previous visitors.

5. To examine the value of positioning theory for use by RTOs in destination marketing planning, by:
  - involving practitioners in the attribute selection stage
  - the presentation of key results to RTOs
  - obtaining practitioners feedback on the value of the results
  - providing benchmarks for RTOs' image tracking and accountability

## **Position of Author**

The thesis has been motivated by first hand experience of the political and marketing challenges involved in marketing destinations. In January of 1989 I was allocated a desk and a phone in a quiet second floor corner of the Rotorua District Council's (RDC) Civic Centre, adjacent the personnel section. A few months earlier, the board members of the district's poorly funded tourism industry collective, the Rotorua Promotions Society (RPS), had resigned en mass. The Rotorua tourism industry was in crisis, and I had been employed, at age 28, to establish a new regional tourism organisation (RTO) on behalf of the RDC. I had previously spent nine years with the New Zealand Tourism Department (NZTD), in New Zealand and Australia.

My experience as Tourism Rotorua general manager was never dull, due to local tourism industry politics and the challenges of marketing a multi-dimensional destination to a heterogeneous world. While the marketing challenges were exciting, the politics were frustrating and boring. However, the two issues are inextricably linked. Thus, while the focus of the thesis is the marketing challenge, the reader will note a number of implicit and explicit references to politics. In this regard, I recall Mayor John Keaney counselling me that Rotorua tourism operators were like farmers, of which he was one, because they were "rugged individuals" (Personal communication, circa 1989). From experience I learnt that tourism operators are happy to be led during a crisis, but demand increasing involvement when progress is being made and the budget is increasing. The more operators are involved in destination marketing planning, the more they must be empowered in

decision-making. However, the more they are empowered the more bureaucratic the process, and the slower decision making becomes. This can in turn be a source of frustration for entrepreneurial RTO staff and the 'rugged individuals' alike. No matter how hard you might try, it is never possible to please all tourism operators all of the time!

It would be an understatement to suggest the task of establishing a Rotorua RTO was recognised as representing a significant challenge. One senior airline official commented at the time: "If you can turn Rotorua around you will be able to write your own ticket!" With the benefit of hindsight, Wahab, Crampon and Rothfield's (1976, p. 92) reflections on negative images were certainly appropriate in Rotorua's case: "It is easy to downgrade a product or allow it to deteriorate; but it is the devil's own work to upgrade a low-image product".

One of the problems noted during my initial meetings with industry groups was the disparate nature of the tourism community. In particular there was a strong perception that RPS promotions had only focused on the larger operators, such as the Agrodome, Rainbow Springs, NZMACI, and Skyline Skyrides, often referred to as 'fat cats'. These larger operators explained to me that since they contributed the majority of funding, it was only fair to expect more promotional exposure. It was also implied that any future destination themes should feature their product. More explicitly, one offered to provide a fund of \$1000 per month, to the office, to ensure a certain product featured in any destination advertising. From discussions with counterparts in New Zealand and overseas, it would appear this was not a situation unique to Rotorua.

Towards the end of my time at Tourism Rotorua, while completing a MBA, I became interested in the theories relating to competitive advantage. The works of strategy 'gurus' Michael Porter, Jay Barney, Gary Hamel and C.K. Prahalad inspired me to consider their relevance to the tourism industry. In particular, I developed an interest in the potential of positioning as a source of advantage, in a world where destinations were becoming increasingly

difficult to differentiate. For example, attend any tourism trade event where New Zealand is involved and note how many RTOs are promoting bungy jumping, white water rafting, jet boating....and this is merely the competition among the participants/contestants in one country that accounts for less than 1% of international holiday arrivals world-wide.

By the time I handed over the reins of the RTO, Tourism Rotorua, in January 1996, the organisation had won two New Zealand tourism awards for 'Best RTO'. The office also won again in 1997 and became the first RTO to win a 'distinction', which is granted to those organisations that have won an award category three times. Through a team effort between staff and tourism operators, Tourism Rotorua had progressed from being one of the lowest funded RTOs in New Zealand in 1989 to the highest in 1996. The office also occupied one of the most distinctive and high profile tourism information centres anywhere. Aspects of this era and my role have been reported by Ateljevic (1998), Ateljevic and Doorne (2000), Horn, Fairweather and Simmons (2000) and Ryan (2002).

Rotorua has always been a 'tourist town', and from my own experience it seems that most locals have an opinion on how tourism works, what the opportunities are and how they should be delivered to the community. The range of RTO stakeholders is not therefore limited to those directly involved in the tourism industry. Everyone in Rotorua seems to know someone in the tourism industry. In my case my mother worked at Rainbow Springs wildlife sanctuary for 30 years and my father-in-law has been the Kaumatua at the New Zealand Maori Arts and Crafts Institute since the early 1990s. I therefore felt it important to include this section and acknowledge the perspective from which I approached this research. I enjoyed 17 years experience as a tourism practitioner, including 11 years in the Rotorua industry. While I have attempted to undertake an objective analysis I do acknowledge that I have brought to the research my own experiences and potential biases. However, it is also important to point out the thesis was undertaken autonomous from any tourism organisation. During the period of

the thesis I rejected opportunities to join RTO boards, in an effort to retain as much objectivity as possible.

While academic theory offers a wealth of opportunities for tourism practitioners, my own experience suggests that implementation for DMOs responsible for co-ordinating a diverse range of stakeholders is often problematic. My interest in theory is motivated by the desire to identify practical solutions to DMOs. However, my concluding recommendations have been made with the knowledge that it is often 'easier said than done'.

## **Thesis Organisation**

The literature review is presented in Chapter 2. Key issues discussed include: a conceptualisation of destination attractiveness, the importance of destination image, decision sets, and the importance of the short break travel context. The chapter concludes with a summary of implications for the thesis. In Chapter 3, the history of Rotorua's destination promotion is explored in an attempt to identify key factors that may have led to the development of the destination's current position in the domestic market.

Chapter 4 presents the methods used to operationalise the destination position construct. First, the chapter details the qualitative investigation used to identify attributes deemed salient to Aucklanders when differentiating domestic short break destinations. This process involved Repertory Grid interviews with Aucklanders for the demand-side view, practitioner interviews to obtain a supply-side perspective and a content analysis of the destination image literature (see also Pike, 2003). The reader will note reference is made to the number of destination image papers reviewed for the thesis - a total of 142 papers published in the literature between 1973-2000. Appendix A provides a summary of context, method and focus of these 142 papers these papers (also see Pike, 2002a). However, Chapter 4 discusses the examination of 84 destination studies as part of the procedure for identifying salient attributes. This is because a continuing effort was made to source and review additional papers throughout the period of the thesis, following the content analysis. Second, the chapter discusses the suitability of

Importance-performance analysis (IPA) as a potential positioning analysis technique. IPA has been demonstrated to be a valid market research technique, and one that was in keeping with conceptualisation of destination attractiveness presented in Chapter 2. IPA has the added benefit of being readily communicable to busy practitioners. The more commonly used multi-dimensional scaling process is also summarised. Additionally, an affective response grid is introduced as a technique to facilitate a positioning analysis based on affective images. Chapter 4 concludes with a description of the design and implementation of a survey instrument, which would enable IPA, MDS and affective response matrix, to identify the positions of competing destinations.

Due to the lengthy nature of the questionnaire, the results section has been divided into three chapters. Chapter 5 describes the sample ( $n = 763$ ), which is considered suitably large and representative for the thesis purpose, and highlights key characteristics of domestic short break holidays. These include intent to take a short break, maximum comfortable driving time, top of mind awareness (ToMA), decision set composition and motivation. Chapter 6 presents the results of the IPA matrices, which proved useful in identifying the strengths and weaknesses of the five destinations (see also Pike, 2002b). The chapter also reports the use of a factor analytic IPA, MDS and affective response matrix, which successfully identifies Rotorua's distinctive position. Chapter 7 presents an analysis of perceptual differences between different subsets of the sample. Firstly the chapter examines differences between non-visitors and previous visitors to each of the competing destinations. Secondly, the results of cluster analyses are discussed. The chapter concludes with a discussion on the characteristics of those respondents who identified Rotorua as their ToMA destination, and examines their characteristics and attitudinal differences compared to other respondents, and the relationship between ToMA and intent (see also Pike, 2002c). Finally, the thesis conclusions are presented in Chapter 8. The conceptual implications and limitations of the results are discussed, as well as recommendations for future research and practical implications for RTOs.

# Chapter 2 – Literature Review

## Introduction

The purpose of this chapter is to both conceptualise and operationalise the destination position construct. In doing so the literature review identifies a number of important theoretical considerations. These are first summarised and then discussed in more detail throughout the chapter.

Although travellers have an almost infinite range of destinations to choose from, they simplify the decision process through the development of a small and manageable subset of likely purchase alternatives. The image held of a destination, by consumers, plays a significant role in this selection process.

Positioning is a key element of a marketing orientation, which, it has been argued, the tourism industry has been slow to adopt. With increasing competition among destinations offering similar products, effective positioning may offer opportunities to develop a competitive advantage, by achieving placement in the smaller set of purchase alternatives.

While there have been a number of different definitions of destination image used by tourism researchers, there has been agreement on the multi-attributed composition of the construct. However, it is clear that to be effective, positioning requires a focus on only one or a few features or benefits. The often divergent expectations of the diversity of destination stakeholders, and the heterogeneous nature of consumer markets, can present problems for DMOs in this regard. There has been no clear agreement on how to accurately measure destination image. Most studies have used structured methods, and there have been calls for a greater use of unstructured methods. Also, most previous studies have focussed on an analysis of cognitive perceptions. There has been little emphasis placed on the affective and conative components of destination images.

It might be expected that images of destinations differ between visitors and non-visitors. However, there have been few investigations into the perceptual differences held of a destination between visitors and those who have chosen not to visit.

There has been little research into the effects of travel context on destination images and market positions. It can be observed that the majority of previous studies have been interested in destinations in North America or Europe. On the other hand there has been relatively research undertaken on destination images in New Zealand, and more specifically very little, if any, attention to the New Zealand short break market. It can also be noted that opportunities exist for applied market research projects involving DMOs. Indeed there have been calls for more useable information to be 'marketed' to practitioners (Riley and Palmer 1975, Taylor, Rogers and Stanton 1994).

## **Consumer Decision Sets**

Arguably, motivation begins the holiday travel decision process, when a need arises that cannot be met at home (Gartner, 1993). Motives may therefore be viewed as the psychological determinants of demand (Kotler, Bowen and Makens, 1999). Motivation in tourism is a relatively new field of study, and researchers have consistently reported a lack of understanding (see Baloglu and McCleary 1999a, Dann 1981, Dann, Nash and Pearce 1988, Fisher and Price 1991, Mansfield 1992, Pearce 1982b). Tourism motivation theories have mostly been conceptual rather than empirical (Ritchie, 1996). However, the lack of theory is not unique to the tourism industry, since the issue of consumer motivation in general is not fully understood (Mansfield 1992, Pearce 1994): "Since it can be justifiably claimed that these issues are not settled within the field of psychology itself, it is rather demanding to expect that they are satisfied in the context of tourist motivation" (Pearce, 1994, p. 119).

One of the first attempts to explain pleasure travel motivation was Gray's (1970) concepts of 'wanderlust' and 'sunlust', which subsume many of the motivation categories outlined in more recent studies. 'Wanderlust' characterised the innate human need to temporarily leave familiar surroundings to experience different cultures and places. It has been suggested that apart from an innate need to explore, all other travel motivations are learnt by individuals (Mayo and Jarvis, 1981). For example, no one is born with the need for status. Therefore, an individual's travel behaviour can change during a lifetime as needs and motives are learned. In this regard, 'sunlust' was described as travel for a specific purpose for benefits not available at home, such as winter sun holidays or visits to a larger city. Related to this was the work of Dann (1977) who used 'push' factors, to explain the link between motivation and destination choice. Motivational push factors were proposed to be a logical antecedent to the analysis of 'pull' factors such as destination attributes. Within the push category, Dann introduced the concepts of anomie and ego-enhancement from social psychology, to explain the core travel motivations. The anomic traveller seeks escape from the mundane and isolation at home to obtain opportunities for social interaction. Ego-enhancement on the other hand requires increased self-recognition, such as opportunities to recreate oneself at a place where identity is not known, or trip-dropping at home to reinforce status.

Working on the premise that a state of disequilibria occurs when a need arises, Crompton (1979a) sought to determine the causes of tension that lead to destination choice. Crompton proposed motives were multi-dimensional, and combined in destination decisions. Indeed, most general buying decisions involve more than one motive (Howard and Sheth, 1969). Crompton concluded a 'break from routine' was the solution to a state of disequilibria. One option for such a break is a holiday, driven by a continuum of socio-psychological and cultural motivations. The socio-psychological motives, 'escape from routine', 'exploration', 'relaxation', 'prestige', 'regression', 'enhancement of family relations', and 'social interaction', were found to be unrelated to the attributes of any particular destination. The two

cultural motives, 'novelty' and 'education', were found to be partially associated with destination attributes. For some of Crompton's respondents the actual destination was unimportant.

Related to the study of tourism motivation is the work of Cohen (1972) and Plog (1974) in categorising traveller types, which have implications for the Rotorua case study. Cohen suggested four types of tourist roles: the organised mass tourist, the individual mass tourist, the explorer and the drifter. While the core motives for most were variety and novelty, each group clearly differed in the level of control and predictability sought from the experience. The key variable in the typology was 'strangeness versus familiarity'. Plog (1974) introduced psychocentricity and allocentricity to travel. Psychocentrics were posited to be nervous and non-adventurous, who travel to familiar places, preferring to drive rather than fly. Allocentrics on the other hand were more confident and willing to experiment with life. These individuals would prefer new experiences such as non-touristy destinations, and prefer to travel by air. Both Cohen (1972) and Plog (1974) linked their concepts to the evolution of a destination's lifecycle. For example Cohen suggested strangeness and novelty were important for travellers. Plog proposed allocentrics would be the first to visit or explore a new destination, while psychocentrics would be attracted at the maturity or even decline stage. However, Cohen suggested mass tourism had created a paradox, where novelty was increasingly difficult to cater to as tourism had become institutionalised.

One of the problems for tourism researchers is the motives for travel may not actually be entirely understood by research subjects (Crompton, 1979a, p. 421): "The in-depth interviews caused many respondents to confront for the first time their real motives for going on a pleasure vacation". Therefore the reasons people give for taking holidays are not sufficient to explain motivation (Mill and Morrison, 1992). Instead, following Maslow's (1943) theory of motivation as a hierarchy of needs, Mill and Morrison argued the key to understanding travel motivation was through the recognition of travel as a needs and wants satisfier: "Motivation occurs when an individual wants

to satisfy a need” (Mill and Morrison, 1992, p. 17). They suggested this view of motivation was the difference between seeing the destination as a collection of attractions and seeing it as a place for satisfying needs and wants. Recognising the needs of an individual traveller will be physical, psychological or intellectual, Mill and Morrison linked the relationships between needs and motives referenced in the tourism literature, as shown in Table 2.1. It could be argued the physiological and safety needs are ‘physical’, while the belonging, esteem and self-actualisation needs are ‘psychological’. The last two categories are ‘intellectual’ needs.

**Table 2.1 Relationship between Needs and Tourism Motives**

<b>Need</b>	<b>Motive</b>	<b>Tourism Literature</b>
Physiological	Relaxation	Escape, relaxation, relief of tension, Sunlust, Physical, mental relaxation of tension
Safety	Security	Health, recreation, keep oneself active and healthy
Belonging	Love	Family togetherness, enhancement of kinship relationships, companionship, facilitation of social interaction, maintenance of personal ties, interpersonal relations, roots, ethnic, show one’s affection for family embers, maintain social contacts
Esteem	Achievement, status	Convince oneself of one’s achievements, show one’s importance to others, prestige, social recognition, ego-enhancement, professional business, personal development, status, prestige
Self-actualisation	Be true to one’s own nature	Exploration and evaluation of self, self discovery, satisfaction of inner desires
To know and understand	Knowledge	Cultural, education, wanderlust, interest in foreign areas
Aesthetics	Appreciation of beauty	Environmental, scenery

**Source: Mill and Morrison (1992, p. 20)**

Recent empirical findings have generally been consistent with the motivation categories introduced in the earlier literature. Moscardo et al (1996) for example found eight factors accounting for benefits sought: ‘escape/excitement’, ‘self-development’, ‘family relations’, ‘physical activity’,

'safety/security', 'social status', 'escape', and 'relaxation'. Similarly, Baloglu and McCleary (1999a) found five factors relating to tourism motivations: 'relaxation/escape', 'excitement/adventure', 'knowledge', 'social opportunities', and 'prestige'. In New Zealand, NZTP (1981) found 'getting away from it all' and 'socialising' represented the primary travel benefits sought by New Zealanders. NZTP proposed the benefits sought from domestic holidays were rest and recreation, whereas for overseas holidays novelty and change were more important. This was consistent with 1975 English Tourist Board research cited by Ryan (1983), which found that 'the need to escape from routine' was the strongest reason given for taking a second holiday.

When motivated to act, the individual consumer-traveller may be viewed as a decision-maker (Mayo and Jarvis, 1981). Decisions must be made about where to go, when to go, how to get there and what to do there. Brand decisions then essentially involve alternative brands and the buyer's own choice criteria (Howard and Sheth, 1969). Choice criteria will be associated with motives. Therefore, while a favourable image of a destination is important, it must also be aligned to the traveller's motives, to increase the likelihood of visitation (Henshall, Roberts and Leighton 1985, Mansfield 1992). Mill and Morrison (1992) suggested one implication of Maslow's hierarchy of needs was that holidays targeting the satisfaction of lower level physical and physiological needs would be treated as a necessity rather than as a luxury. A key issue in the thesis is the concept of short break holidays as such a necessity. Of particular interest is how travellers select a holiday destination from so many places, particularly at the lower levels of needs, where many destinations could ably provide satisfaction.

The theory of consumer decision sets offers some explanation of this most complicated aspect of consumer behaviour. Howard (1963) and Howard and Sheth (1969) introduced the concept of the evoked decision set to propose the number of brands considered in any purchase decision was considerably lower than those available. The evoked set was defined as comprising only those brands the buyer will actually consider in the next purchase decision.

Howard proposed the number of brands in an individual's evoked set would remain constant at about three or four. Woodside and Sherrell (1977) were the first to investigate evoked sets of destinations in the holiday decision process. They were motivated by the proposition that the mental processes required to evaluate the features of 15 or more destinations would represent too great a task for most travellers.

Decision sets are formed by a combination of external information sources such as prior experience, general knowledge, advertisements and feedback from friends, as well as internal factors such as needs, motivation and evaluative criteria (Spiggle and Sewall, 1987). The reduced set of likely alternatives that form the evoked set is part of the total set. For travellers, this total set would consist of all those destinations that may or may not be available, and which they may or may not be aware of. How many destinations must there now be on the planet? Within this total set of destinations, Woodside and Sherrell (1977) proposed the following possible overlapping sub-sets:

- Unavailable and unaware set
- Awareness set
- Available set
- Evoked set
- Aware and unavailable set
- Available and unaware set
- Inert set
- Inept set
- Chosen destination

Since consumers will either be aware or unaware of the existence of a product, it is from the awareness set that a purchase choice will ultimately be made (Narayana and Markin, 1975). Clearly, a destination must firstly make it into the consumer's awareness set for consideration. However, as simple and logical as this may appear, from a practical perspective this represents a

significant challenge for some destinations. Lilly (1984), for example, discussed the difficulties of promoting North Staffordshire, a region with little tourist image outside its own boundaries. It is important to recognise the distinction between this problem and that of a negative image, since the existence of such imagery denotes awareness. However, more than simply awareness of a destination is required. For example, Milman and Pizam (1995) found awareness of a popular USA domestic destination was not necessarily a strong indicator of intent to visit. In short, other determinants of choice exist.

Crompton (1992) suggested operationalising the awareness set in tourism would be problematic, since the number of destinations a consumer is aware of will usually be greater than for consumer goods brands. The number of packaged goods brands would probably be limited to the range of 10 to 30, whereas it would be reasonable to expect that the number of destinations a traveller is aware of would be much greater than this (Oppermann, 1999). Due to the number of possible destinations in the awareness set, it is therefore more realistic for the marketer to determine the composition of the early consideration set. These are the destinations the consumer believes could realistically be visited within a given time period. This represents the overlap of the awareness and available sets.

Woodside and Sherrell (1977) found the mean number of destinations available to a small sample of 71 domestic self-drive travellers in South Carolina was only 5.7. Similarly, Thompson and Cooper (1979), who replicated Woodside and Sherrell's survey format, sampling 112 domestic visitors to Tennessee, found respondents considered a mean of 6.2 holiday destinations available for travel during the next year. Woodside and Sherrell (1977) proposed the number of destinations in the early consideration set would be larger for air travellers who would have a greater selection of international destinations. However, Woodside, Ronkainen, and Reid's (1977) study, which used respondents in USA and Finland found this not to be the case.

Miller (1956) cited a number of studies from the consumer psychology literature to suggest the limit to the number of stimuli people would generally be capable of processing would be around seven. Miller even linked this proposition to the use of questionnaire rating scales, where seven points had generally been considered the limit of usefulness. The number seven may have implications for the length of such items as phone numbers, car registration plates and PIN numbers, as well as consumer decision sets. Also, Ries and Trout (1986) offered examples of the Seven Wonders of the World, seven-card stud and even Snow White and the seven dwarfs. Woodside and Sherrell's (1977) literature review found this limit had generally been consistent in brand recall tests across product categories as diverse as cars and toothpaste.

When a consumer becomes involved in a purchase decision the early consideration set is categorised into three subsets: inert, inept and evoked (Narayana and Markin, 1975). The inert set consists of brands for which the consumer has neither a positive nor a negative opinion. The consumer will have some awareness of the destination to stimulate initial interest and inclusion in the early consideration set, but may lack information to make a judgement. Or they may have sufficient information but see no advantage in pursuing it further at that point. The consumer is undecided about visiting these destinations within a certain time period. In Woodside and Sherrell's (1977) study, the mean number of destinations in the inert set was .9. Thompson and Cooper (1979) found a mean of 1.8, while Woodside and Lysonski (1989), who used a convenience sample of 92 New Zealand students found a mean of 1.7 overseas destinations.

The inept set consists of brands the consumer has rejected from the initial purchase consideration within some time period. Destinations in the inept set will have been rejected from the early consideration set due to negative perceptions, perhaps from comments by significant others for example. Woodside and Sherrell (1977) found the mean number of destinations in the inept set was 1.4. Others have found similar means, including 1.8 (Thompson and Cooper, 1979) and 1.6 (Woodside and Lysonski, 1989).

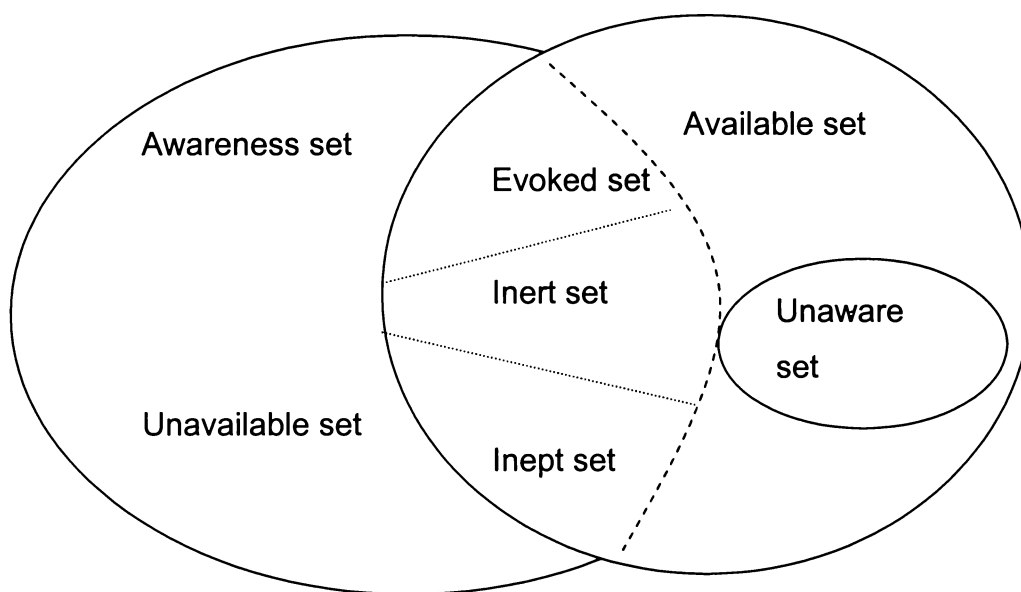
Woodside, Ronkainen and Reid's (1977) four sample sub-groups generated mean inept sets of 1.8, 1.7, 2.3, and 2.1.

Once the inert and inept destinations have been eliminated from the early consideration set the remaining destinations form the evoked decision set. The evoked set comprises those destinations the consumer has some likelihood of visiting within a given time period (Woodside and Sherrell, 1977). Woodside and Sherrell found that perceptions of destinations listed in the evoked set of their respondents were more favourable than for those listed in the inert and inept sets. In their study the evoked set size averaged 3.4 destinations for selection during the following twelve months. Woodside and Sherrell's results have been supported in a number of other destination studies. For example, Bronner and de Hoog's (1985) small sample of 40 Amsterdam residents supported Woodside and Sherrell's proposition of four plus or minus two destinations in the evoked set. Thompson and Cooper (1979) found a mean evoked set size of 2.7. Other studies have found means of 4.2 (Woodside and Lysonski, 1989) and 3.1 (Ryan, 1994b). Woodside, Ronkainen and Reid's (1977) four sample sub-groups generated mean evoked sets of 3, 2.8, 1.5, and 1.1 destinations, while Um and Crompton's (1990) longitudinal study of destination choice found evoked set means of 3.3 and 3.8. This limited set size supported the previously mentioned range of three to four suggested by Howard (1963). The relationships of these decision sets are presented in Figure 2.1, where, it should be noted, no attempt has been made to design set sizes to scale.

For consumer goods, it has been suggested that brands excluded from the evoked decision set may have a purchase probability of less than 1 per cent (Wilson, 1981). The concept of the evoked set therefore has important implications for DMOs if it is from this set that final destination selection will be made (see Crompton 1992, Thompson and Cooper 1979, Woodside and Lysonski 1989, Woodside, Ronkainen and Reid 1977, Woodside and Sherrell 1977). It must be accepted that a hierarchy is developed within the evoked set of destinations, if a final selection is to be made. The higher a brand's position in a consumers mind, the higher the intent to purchase

(Wilson, 1981). Woodside and Wilson (1985) cited research by Burke and Schoeffler (1980), which supported this proposition. It has been shown that top of mind awareness (ToMA), measured by unaided recall, is related to purchase preference among competing brands (Axelrod 1968, Wilson 1981, Woodside and Wilson 1985). Consequently, for the destination that first comes to mind when a consumer is considering travel, ToMA must surely represent a source of advantage. The goal of any promotional campaign is to guide consumers through the hierarchy of awareness to comprehension to favourable attitude to interest and intent (DiMingo, 1988). Influencing this decision process of travellers is the focus of DMO activities. It is proposed ToMA may be achieved through effective positioning.

**Figure 2.1 Destination Decision Sets**



# Positioning as a Potential Source of Advantage for Holiday Destinations

Effective positioning can be a source of competitive advantage for organisations in a given industry (Porter, 1980). Porter described an industry as consisting of those organisations that would be close substitutes for each other. While it has been claimed there had been no study analysing destination switching (Grabler, 1997d), it is generally accepted that destinations are substitutable, since it could be assumed that the costs of switching destinations would not be high for travellers. This would be particularly so in highly competitive markets such as Mediterranean package holidays, where pricing renders many destinations substitutable. It should be questioned, where pricing and the nature of product (primarily sun, sea and sand) renders many destinations substitutable. It should be questioned, where price is a dominant factor, whether positioning has the ability to overcome cost factors. Buhalis (2000, p. 109) offered the example of the Calvia Municipality in Mallorca, which had been successfully re-positioned in this market to attract increased demand and a “higher willingness to pay”. Therefore, would not the successful positioning of a destination into a consumer’s evoked decision set represent a source of competitive advantage over the majority of competing places?

Corporate strategy should serve to maximise strengths, correct weaknesses, avoid threats and maximise opportunities. Porter (1980) suggested a competitive strategy was one that positioned a business to make the most of strengths that differentiated the firm from competitors. A firm’s success is ultimately achieved through “attaining a competitive position or a series of competitive positions that lead to superior and sustainable financial performance” (Porter, 1991, p. 96). A sustainable competitive advantage (SCA) is gained when consumers perceive a performance capability gap that endures over time (Coyne, 1986). Coyne suggested that to gain an advantage the gap must be through a product attribute that represents a key buying criterion, which was not offset by a negative performance on another attribute. Working on the assumption that resources are heterogeneous and

immobile across firms, Barney (1991, 1996) developed the VRIO model as a tool for determining the competitive status of resources controlled by a firm. Immobility refers to the difficulty of buying the resource from the market place. To achieve SCA, the VRIO model firstly requires a resource to be valuable to the firm for either increasing revenue or decreasing costs. Other strategy theorists also acknowledge the two routes to success are via increased customer value or by reducing costs (see for example Day and Wensley 1988, Porter 1980). Secondly, the resource should be relatively rare. Thirdly, it should be costly for competitors to imitate. Finally, the firm must be organised in such a way that it is able to exploit the resource in the market.

As has been suggested, there has been little research on destination competitiveness (Buhalis, 2000). However, an important question raised by Ritchie and Crouch (2000) was whether destination 'stars' were made or born. Ritchie and Crouch offered the example of Russia, well endowed with natural resources but lacking in deployment, in comparison to destinations such as Singapore, Las Vegas, Branson and San Antonio, all of which had developed successful tourism strategies with limited endowed resources. They suggested an understanding of success drivers was of fundamental importance, and categorised these into resources that would represent sources of either comparative or competitive advantage. Endowed resources inherited by a destination, such as climate and scenery, are categorised as sources of comparative advantage. However, resources created by the destination, which may be the way in which endowed resources are deployed in the market, represent sources of competitive advantage. An example of this was provided by Dascalu (1997), who cited comments from a former Romanian Minister of Tourism concerned that his country had enormous tourism resources but that the tourism industry was under-performing. These resources may represent sources of comparative advantage but were not being used to achieve a competitive advantage.

A tourism resource has been defined as “anything that played a major role in attracting tourists to the study region, including natural resources, tourism events, outdoor recreation facilities, and tourist attractions” (Spotts, 1997, p. 5). While a resource audit would therefore be a key component of marketing planning, Ferrario (1979a, 1979b) suggested the availability of tourism resources was often taken for granted by both practitioners and academics. More recently the process of auditing a destination’s resources has received increased attention in the literature (see for example Faulkner, Oppermann and Fredline 1999, Pearce 1997, Ritchie and Crouch 2000, Spotts 1997). Following Ritchie and Crouch (2000b), a categorisation of DMO resources representing sources of comparative and competitive advantage is presented in Table 2.2.

**Table 2.2 DMO Resources Representing Competitive Advantage**

<b>Sources of Comparative Advantage</b>	<b>Sources of Competitive Advantage</b>
Natural resources such as location, landscape and climate	Developed resources such as accessibility, infrastructure, and the scale, range and capacity of man-made attractions and other superstructure.
<u>Cultural</u> resources such as history, language, cuisine and culture.	<u>Financial</u> resources such as the size and certainty of the DMO budget; private sector marketing resources; influence on government fiscal policy such as taxation, investment incentives and capital expenditure on infrastructure developments; size of the local economy; access to capital for product developments and ability to attract new investment.
<u>Human</u> resources such as skills and availability of the region’s labour force; industrial relations; industry service standards; and attitudes of locals.	<u>Legal</u> resources such as brand trademarks, licenses and visa policies.
<u>Goodwill</u> resources such as travellers’ ancestral links to the destination; friends and/or relatives; novelty or fashionability of the destination; ToMA levels; levels of previous visitation and satisfaction; and perceived value.	<u>Organisation</u> resources such as governance structure and policies; staffing levels, training, experience, skills and retention; organisational culture; innovation; technology; and flexibility.
	<u>Information</u> resources such as a marketing information system.
	<u>Relationship</u> resources such as internal/external industry integration and alliances; distribution; stakeholder co-operation; and political influence.
	<u>Implementation</u> resources such as sustainable tourism development planning; positioning design and promotion; ease of making reservations; consistency of stakeholders’ delivery.

Source: After Ritchie and Crouch (2000b)

As shown, it is suggested positioning lies within 'implementation', which has also been referred to as 'organisation' (Barney, 1991), and 'resource deployment' (Ritchie and Crouch, 2000). Day and Wensley (1988) also proposed an advantage could be attained through superior human resource skills. It is argued that one of the most critical implementation actions is market positioning, which includes the identification of sources of comparative advantage and stimulation of the delivery of superior value.

There are essentially eight ways to position a destination, following Aaker and Shansby (1982) and Wind (1980):

- By destination attributes or features, such as climate, facilities or location.
- By benefits, such as opportunities for socialising.
- By price/value and/or quality.
- By travel context, or type of travel, such as winter sun holiday.
- By segmentation.
- Against another destination. For example, Samoa has been described by its DMO marketing manager as being "like Fiji used to be 30 years ago" (Oscar Netzler, Personal communication, October 2001).
- Dissociation with a destination class. For example, Ries and Trout (1986, p. 146) recommended Jamaica be positioned as the "Hawaii of the Caribbean".
- Any combination of the above.

The most popular approach for consumer goods has been positioning by product attribute (Aaker and Shansby, 1982). However, not all attributes that differentiate a product from competitors are actually important to the consumer (Crompton, Fakeye and Lue 1992, Lovelock 1991, van Limburg 1998, Woodside, 1982). Thus, a priority should be the identification of those destination features that may represent sources of comparative advantage. The ideal for any product is to be perceived favourably on product attributes that are important to the market. Different terms have been used in the

tourism literature to describe important attributes. Moutinho (1994) used the term 'critical' to describe those characteristics consumers desire, while Crompton, Fakeye and Lue (1992) referred to 'strong' attributes. As indicated previously, Coyne (1986) used 'key buying criterion'. For the thesis, the terms important, salient and determinant have been adopted.

Salience concerns the order in which features are elicited from consumers, where the most important may be offered first. Important attributes may be salient but not necessarily determinant. It is essential to identify those attributes that determine product choice, to form the basis for any positioning campaign (Lovelock 1991, Ritchie and Zins 1978). Myers and Alpert (1968, p. 13, italics as in original) offered the first definition of determinance in the marketing literature: "*Attitudes toward features which are most closely related to preference or to actual purchase decisions are said to be determinant; the remaining features or attitudes - no matter how favourable - are not determinant*". A product feature may be important to a consumer, but if competitors are perceived to offer the feature equally, the feature will not affect decision-making. Determinant attributes, on the other hand, are those where customers see significant differences between competing brands (Lovelock, 1991). Myers and Alpert preferred the term 'determinant' due to the dilution of 'important' through overuse. The example of airline safety has often been used to illustrate the differences between importance, salience and determinance (see Lovelock 1991, Mayo and Jarvis 1981, Myers and Alpert, 1968):

*Air travelers are naturally concerned with an air carrier's safety record, but presumably the safety records of all major carriers are more or less the same. Thus, safety would not be a salient attribute when one is choosing an airline to fly between two major cities. Similarly, when one chooses from among four or five major motels at a particular location, cleanliness would probably not be a salient attribute (Mayo and Jarvis, 1981, p. 192).*

Myers and Gutman (1974) found airline safety an important but non-determinant attribute for business travellers. Rather, determinant attributes may be features such as price, on-board service or schedules. It remains to

be seen how the September 2001 terrorist attacks will impact on the safety paradigm, in terms of differentiating competing airlines.

Intervening and moderating variables may also affect this process. Intervening variables are those that may be of a short or long term nature, but are situational and so delay rather than deny the choice. Moderating variables on the other hand are those that are longer term or permanent inhibitors. Therefore an attribute may be salient to an individual but not determinant due to external influences. For example, a husband may regard golf courses as salient but may be limited in holiday choice to destinations preferred by his spouse.

Once the range of determinant attributes is known, a decision on which to focus on in communications must be made. This means making trade-offs: "You can't stand for something if you chase after everything" (Ries, 1992, p. 7). Success is most likely when the range of differentiated features emphasised is small, since using more than two attributes will usually result in a confused image (Aaker and Shansby 1982, Crompton, Fakeye and Lue 1992). Focus was one of the three generic positioning strategies for competitive advantage recommended by Porter (1980). The others were cost leadership and differentiation. Authors have been critical of the Porter typology in terms of relevance in tourism (see Olsen 1991, Poon 1993), while others have suggested the model can be adapted for tourism (Tribe, 1997) and positioning destinations (Evans, Fox and Johnson, 1995).

Trout and Rivkin (1995) reinforced the power of focus, or oversimplification, with the proposition that our minds hate confusion. In an age when the information flood is increasing exponentially, the message should not try to tell the product's entire story, but rather focus on one powerful attribute, since more brand variations cause confusion. Ries (1992) suggested that owning a word in the target's mind had become the most powerful concept in marketing. Therefore the following question should be asked: "What single idea or concept does my company (or brand) stand for in the mind of the prospect?" (p. 5, brackets as in the original). Al Ries and Jack Trout have

practised what they preach, with 'ownership' of the positioning construct. It is rare to read any positioning article in the marketing literature that does not reference their work.

The focused message must also be consistent over time. Woodside (1982) offered the example of Nova Scotia as a destination with a vague image, where a contributing factor was the use of four different destination promotion themes in as many years. Similarly, Pritchard and Morgan (1998) cited the Spanish NTO marketing director advising that marketers of Valencia were mandated to issue new advertising contracts each year, which did not stimulate consistency of message.

Positioning destinations is an eight-stage process, following Aaker and Shansby (1982), Crompton, Fakeye and Lue (1992), DiMingo (1988) and Reich (1997):

1. Identify the target market.
2. Identify the competitive set of destinations in the travel context.
3. Identify the benefits sought by visitors and non-visitors in the target market.
4. Identify perceptions of the destination's strengths and weaknesses.
5. Identify perceptions of strengths and weaknesses of competing destinations.
6. Identify opportunities for differentiated positioning.
7. Select and implement the position for competitive advantage.
8. Monitor the performance of the positioning strategy over time.

On the surface this may appear a reasonably straightforward process. However, the destination product is an experience comprising both commercial and non-commercial services, which DMOs have little control over. While focus may be appropriate for single product marketers, the selection of one determinant attribute by a destination marketer is usually problematic. For destinations, Ries and Trout (1986) used the analogy of postcard images to sum up how a place was positioned in the mind. Clearly

there is a limit to the amount of information that can be portrayed on a standard size postcard. DMOs must design a positioning strategy focused on one or few attributes, when the region probably contains a wide range of often quite diverse features and products, and where stakeholders who contribute to DMO campaigns may have vested interests in quite different markets. The multi-attributed nature of destinations represents a major challenge in the positioning process, as does the heterogeneity of consumer markets.

## **The Multi-Dimensional Nature of Holiday Destinations**

Since destinations are multi-attributed, a common challenge faced by DMOs is the number of suppliers who make up the destination product. In the UK, for example, the North West Tourist Board conceded the product range was too diverse to market effectively as a single entity (Alford,1998). In New Zealand, Pike (1998) found seven RTOs identified over four hundred local tourism businesses within their territory, while eight RTOs indicated a range of two hundred to four hundred. One of the leadership challenges for DMOs is to identify destination images of mutual value to stakeholders and travellers, and then foster a consistency of message. However, it cannot be assumed that all individual businesses will accept a holistic and focused approach to generic destination imagery. Instead, DMO stakeholders will usually seek a profile for their product, which may not necessarily meet consumer needs. For example, Curtis (2001, p. 77) reported the resistance of regional tourism organisations towards a recommendation by the Oregon Tourism Commission to use a central advertising agency in a major repositioning campaign: "Ultimately the coordinated regional Brand Oregon marketing efforts began to fail". In New Zealand there has been recurring criticism from Rotorua tourism operators about the over-use of 'snowy mountain scenes' in Tourism New Zealand promotions. Also, Lawton and Page (1997) found the imagery used in the brochures of Auckland tourism operators, varied significantly to that promoted by Tourism Auckland, the region's RTO. Tourism Auckland was using the strapline 'City of Sails', and

yet few operators' brochures actually featured ocean-based products. New Zealand's fragmented industry has also been noted in the press:

*The tourism industry (in New Zealand) is so fragmented, diverse, unfocused, self seeking and disorganised that PhD theses have been written on its structural complexities. It's got more separate working parts than a 747's Rolls Royce engine and only some of them are headed in the same direction (Chamberlain, 1992, p. 21).*

Therefore one of the major roles of the DMO is to develop a cohesive approach among stakeholders to enhance destination competitiveness. It makes sense to share resources in an effort to create a bigger impact in the market, a philosophy sometimes referred to as 'cooperating to compete'. However, this operational challenge should not be confused with the primary mission of the DMO, which must be to generate sustainable tourism development. While it could be argued that the term 'sustainable tourism development' is an oxymoron, it does represent a planning approach grounded in a long term and holistic perspective. The rationale for sustainable development planning is that the tourist experience is the central element in the tourism market (Hall, 1998). The experiences of tourists influence future travel: "Therefore it becomes imperative that the tourist experience and the tourism industry is sustainable and does not damage the capacity of the physical, social and economic environment to absorb tourism" (Hall, 1998, p. 18). Clearly however, this may not be a priority for individual businesses struggling for short term survival.

There are fundamental differences between the management of private sector tourism interests and DMOs, and the way they market their products. In general, destination marketing organisations lack the functional and managerial integration found in theme park resorts such as Disney World in Florida (Laws, 1995). Also, the role of individual RTOs is not uniform. For example, some RTOs may exist primarily to serve the needs of their members (see Lilly, 1984). Others, as a result of public funding, will have broader holistic destination marketing responsibilities. Even a DMO in this situation may still be constrained. For example, Tourism New Zealand

receives government funding to focus on international marketing. The organisation's stated role is to increase overseas arrivals:

*Now the tourism industry has matured to a level where the national marketing body can concentrate its resources on attracting international visitors, safe in the knowledge that when they arrive, the New Zealand tourism experience is world class. ([www.tourisminfo.co.nz](http://www.tourisminfo.co.nz), 22/10/02).*

A common challenge however is the lack of control over the individual businesses they represent. Plog (2000) predicted managed destinations, such as resorts and cruise ships, would become increasingly popular in the future due to their ability to manage capacity and maintain consistency of quality. d'Hautesserre's (2000) analysis of Foxwoods Casino Resort suggested the success factors would be much more problematic for destinations than managed resorts. These factors included for example staff empowerment and the reinvestment of earnings into product development. With this in mind, of interest was the call for a reduced number of RTOs in the New Zealand Tourism Strategy released in 2001 (see Tourism Strategy Group, 2001). One of the strategy goals was for a smaller number of 'NewRTOs' to be established from the existing 25 RTOs. Through sharing common back office functions, it was suggested the reduced number of RTOs would make significant savings in overhead costs, which could then be more effectively used in promotion. The 'NewRTOs' would take an enhanced role in overseas and domestic marketing. However, the strategy did not discuss how the proposal would be implemented, and in particular how the political implications would be addressed. Of interest also is how RTOs themselves have responded, and with references to changes foreshadowed by the 2002 Local Government Bill, are reinventing themselves as having broader planning remits. This is evidenced by current restructuring by Rotorua District Council and Tourism Rotorua to devise a broader planning entity that considers community needs with reference to economic and social planning that contextualises tourism in this process.

While targeting products to the perceived needs of segments is a marketing axiom (Assael, 1971), positioning also requires a focus on the competition. Hunt and Morgan (1995) proposed a market orientation involves continuous evaluation of data relating to current and future customers, and current and future competitors. However, many tourism organisations operate in mass markets with millions of consumers (Lovelock and Weinberg, 1984). The problem of a broad focus usually occurs for public agencies that have a broad mandate (Lovelock and Weinberg, 1984). Many DMOs face this challenge, where stakeholders' market interests will be diverse.

## **Market Heterogeneity**

Tourism demand does not represent a homogenous group of people with identical motivations (Wahab, Crampon and Rothfield, 1976). Since travellers have differing needs, segmenting the market to identify clusters is a critical step in the positioning process. Segmentation is a systematic process that is necessary due, not only to the increasing range of competing tourism products in the market, but also because of the high costs of mass promotion (Vanhove, 1994). The need to focus resources then leads to the central operational decision for tourism marketers being able to identify the target market (Moutinho, 1994).

Since tourism demand is heterogeneous it is important to recognise the difference between those images held by an individual, and stereotypes. Gunn (1988) proposed we all have images of destinations, whether or not we have visited them. Such images are indicative of our own likes and dislikes, and are therefore highly personal. However, stereotypes can also occur when there is a consistently uniform account of a destination by a group of people. Lynch (1960) proposed that common images of a city environment would be held by large numbers of people. The number of people holding this particular image will be, therefore, a calculable percentage of the total population (Reynolds, 1965). Pearce (1988) suggested a stereotype could be said to exist when more than 20 per cent of respondents offer similar descriptions of a place. The wider body of work on stereotyping was beyond

the scope of the thesis. However, it is acknowledged that stereotyping points towards a simplification of the complex, and implies a decreased willingness to change perceptions. Since stereotypes are easily accessed from memory, the encouragement of positive stereotyping, and avoidance of negative stereotypes, will therefore be key goals of DMOs. In this regard Gronhaug and Heide (1992) suggested advertising may produce stereotype images in receivers who had little knowledge of a destination. Reynolds (1965) argued that word associations generally tended to be consistent among consumers. Therefore, transmitting the right code words could stimulate the desired associations.

Market aggregation represents an undifferentiated approach, where all consumers are treated as one. At the opposite end of the continuum is total market disaggregation where every consumer is treated individually as a separate segment (Lovelock, 1994). There are obvious limits as to how far this can be taken by DMOs. Admittedly, important trade customers such as inbound tour operators would be an example of marketing to the needs of an identifiable, individual client. However, for the free independent tourist market there needs to be a middle ground in the continuum, which is where segmentation is of use. Positioning has its roots in segmentation theory (Haahti, 1986), and the two concepts have become inseparable in the marketing process (Aaker and Shansby 1982, Hooley and Saunders 1993):

*Positioning usually implies a segmentation commitment. Positioning usually means that an overt decision is being made to concentrate only on certain segments. Such an approach requires commitment and discipline because its not easy to turn your back on potential buyers (Aaker and Shansby, 1982, p. 61).*

A destination's image may differ between regional markets (Hunt, 1975) and between different segments (Fakeye and Crompton 1991, Phelps 1986). However, it has been suggested that destinations seldom research the differences in the images held by different markets (Ahmed, 1996). Undertaking needs analyses on a segment-by-segment basis provides marketers with opportunities to understand the needs of that segment better

than competitors (Lovelock, 1991). After all, for a destination, different segments will likely differ in their decision sets (Crompton 1992, Woodside, Ronkainen and Reid 1977). This then enables separate advertising briefs for different segments. However, when considering the range of segments that will be of interest to a DMO's stakeholders, such an assessment appears daunting. For example, within New Zealand's domestic market, Lawson, Thyne and Young (1997) found six lifestyle segments for New Zealand travellers: The family holiday (14 per cent of respondents), outdoor adventurers (13 per cent), sports devotees (21 per cent), fun loving holidaymakers (14 per cent), education seekers (17 per cent), and special family occasions (21 per cent). As discussed by Hooley and Saunders (1993, p. 154), a company taking the multiple segment approach "may face a diseconomy in managing, supplying and promoting in a different way to each of these segments it has chosen". Woodside (1982) also presented a warning in this regard, suggesting it is more effective to offer one set of benefits to one significant segment.

Positioning multiple brands in a dynamic environment requires significant financial and management resources (Moutinho, 1994). However, destination marketing is often undertaken by organisations that have no direct financial interest in the region's product offerings. Also, in many cases such organisations have quite limited budgets. Non-business organisations usually cannot cover costs through sales, and often devote ongoing efforts to generating new tax revenues, sponsorships and/or contributions from members. Therefore they are more open to public control and political interference. Clearly then, undertaking the eight-stage destination positioning process on a segment by segment basis in all markets, for different travel contexts, would present a significant challenge for smaller DMOs such as a New Zealand RTO. It follows that even with a wide range of attractions, some destinations may not fulfil potential opportunities (Hunt, 1975), where, due to poor decision-making, implementation and/or limited budgets, the desired image has not been achieved in the market.

# Image

The key construct in positioning is image. A major objective of any destination positioning will be to either create a new image, or to reinforce positive images. An important first step is to develop an understanding of the current image held by the target. The issue of image is now discussed, through three questions:

- How important is image in tourism marketing?
- How has destination image been defined?
- What is the process of destination image formation by travellers?

## The Importance of Image in Tourism Marketing

At the 2000 Travel & Tourism Research Association (TTRA) conference in Los Angeles, John Hunt used the example of three peasants breaking in a new field, to describe the 1970s destination image research undertaken by himself, Edward Mayo and Clare Gunn. In almost three decades since this pioneering work, the topic has become one of the most prevalent in the tourism literature. For examples, the reader is referred to Pike's (2002a) categorisation of 142 destination image studies published in the literature during the period 1973-2000. Chon's (1990) review of 23 frequently cited destination image studies, found the most popular themes were the role and influence of destination image in traveller buyer behaviour and satisfaction. It has been suggested that images held by potential travellers are so important in the destination selection process that they can affect the very viability of the destination (Hunt, 1975). Examples of this are offered in a later section of the chapter that discusses the effects of negative images. Most tourism products are services rather than goods, and can often only compete via images. The characteristics of services, in comparison to tangible goods have been well documented in the marketing literature: intangibility and risk, substitutability, heterogeneity, inseparability and perishability. The implications of these for destinations are now briefly summarised.

## **Intangibility and Risk**

Prior to purchase, a stereo can be played in the store, and a car may be taken for a test drive. Tangible 'things' can generally be touched and inspected, returned or exchanged. However, the only physical evidence of a distant holiday destination may be on the pages of a brochure, holiday snapshots or on television. Expectations of a holiday are therefore realisable only after purchase and actual travel (Goodall, Radburn and Stabler, 1988). If a traveller has not previously visited a destination, the image held can provide a pre-taste (Crompton, 1979b). Therefore image may have as much to do with success of a destination as its tangible attributes, since decision makers will act on their perceptions rather than on objective reality (Hunt 1975, Um and Crompton 1990). Lovelock (1991) has suggested that explicit positioning can help consumers to gain a mental fix on an intangible product. Therefore a consequence of intangibility is increased risk in the purchase process. Several types of risk may be of concern to travellers and suppliers:

### ***Performance Risk***

Will the product or service function as required? It has been proposed that unlike many other service encounters, with holidays there exists strong motivation by the tourist for a successful outcome (Ryan, 1999). However, there is still an element of risk in the holiday purchase decision, since it is consumed at another time and place (Sirakaya, McLellan and Uysal, 1996). Under normal warranty conditions a tangible product such as a stereo or car may be repaired or replaced. While legislation in New Zealand such as the Fair Trading Act (1986) and the Consumer Guarantees Act (1993) offer protection to travellers against misleading advertising and incorrect product provision, many aspects of a holiday experience cannot be repaired or replaced. Holiday performance risks include such diverse issues as inclement weather, civil unrest, grumpy travellers, theft, earthquakes, fluctuating exchange rates, traffic delays and airport congestion.

### ***Physical Risk***

Is there potential for harm en route to, or at a destination? The September 2001 terrorist attacks and ongoing conflict in Israel represent the extreme in this regard.

### ***Psychosocial Risk***

Psychosocial risk questions whether travel will enhance well being or self-concept (Mayo and Jarvis, 1981). Also, is there potential for embarrassment? Mansfield (1992) referred to the social stress of travel, when motivated to travel by membership of a social reference group. This may also occur when joining a coach tour of strangers. Since holidays represent interplay between merging into a group and affirming individuality (Mollo-Bouvier, 1990). There may also be stress involved when travelling in unfamiliar environments. Therefore the reverse might also be said to apply.

### ***Financial Risk***

Will the financial investment represent value? Generally, the annual holiday is regarded as a high involvement decision involving significant household expenditure (Driscoll, Lawson and Niven 1994, Ryan 1995). The higher the level of involvement in the decision the higher the perceived risk will likely be. Domestic holidays in New Zealand may not involve a significant financial outlay due to the use of private cars and family owned accommodation (NZTP, 1981). Thus holiday expenditure can represent day-to-day living expenses transferred to holiday situations.

### ***Inseparability and Variability***

Customers are usually actively involved in the creation of service, since production and consumption occur simultaneously. Also, travellers seek a greater involvement in tourism products, as participants rather than passive observers (Crouch, 2000). Satisfaction results from a series of producer/consumer interactions in which the DMO has no control. Are experiences congruent with the marketing imagery and consumer expectations? Also, every perceived experience may be quite different, leading to different perceptions of value (Kotler, Bowen and Makens, 1999).

Dissatisfaction may occur when groups with conflicting habits share the same experience. Kotler, Bowen and Makens used the example of a couple seeking a romantic dinner being seated in the same hotel restaurant as noisy convention delegates. This is a significant issue for destinations targeting a diversity of market segments.

### **Perishability**

Tourism services are perishable, since they cannot be stored for sale during high demand periods (Goodall, Radburn and Stabler, 1988). Individual businesses must therefore manage their capacity with projected levels of demand. For example, the CEO of the New Zealand Maori Arts & Crafts Institute, was uncertain about post-September 2001 effects as bookings from tour operators were only made a few days in advance (Alison Lawton, Personal communication, October 2001). For DMOs, this also presents challenges in forecasting peaks and troughs.

### **Substitutability**

Travellers are offered a variety of destinations that will satisfy their needs, and consumers may or may not consider different destinations for different types of holidays throughout the year. For example, there may or may not be a wide variance between the types of destinations considered for an impromptu short break, and an annual summer holiday. Also, for each type of holiday, needs may be satisfied by destinations with different attributes (NZTP 1988/27, Rusk 1974, cited by Woodside and Carr 1988). As a result, some destinations can be perceived as being commodities characterised by physical attributes promising undifferentiated experiences (Hall, 1997).

## **How has Destination Image been Defined?**

While it is agreed that destination images can play an important role in travel decisions, the definition of 'destination image' is not so certain. Destination image research has been one of the most pervasive topics in the tourism literature during the past 20 years (Fakeye and Crompton 1991, Kearsley, Coughlan and Ritchie 1998). However, a number of authors have been

critical of attempts to conceptualise the construct. It has even been proposed that most destination image studies lacked any conceptual framework (Echtner and Ritchie 1991, Fakeye and Crompton 1991). From a review of 15 studies between 1975 and 1990, Echtner and Ritchie suggested most definitions were vague, such as 'perceptions of an area'. Jenkins (1999) found the term destination image had been used in a number of different contexts, including for example perceptions held by individuals, stereotypes held by groups and images projected by DMOs. The range of definitions used in the tourism literature has been so great that 'image' is becoming a marketing jargon 'noun' (Cossens, 1994a). Echtner and Ritchie (1991) and Cossens (1994a) questioned whether researchers were actually certain of the unique properties of destination image, and whether it could be accurately measured. This claim has not been limited to tourism however. For example Gardner and Levy (1955, p. 35), strongly recommended the use of qualitative research to enhance advertisers' understanding of consumers' goals and how these might relate to how their brands were evaluated against rivals. They acknowledged that images might be vague:

*Sometimes the notions people have about a brand do not even seem very sensible or relevant to those who know what the product is "really" like. But they all contribute to the customer's deciding whether or not the brand is the one for me.*

King (1970) lamented the fact that while brands had emerged over a century previously, there was a lack of theory on what a brand was. Dobni and Zinkhan's (1990) review of brand image studies found little agreement on either the definition of the construct or on how it should be operationalised. Poiesz (1989) also pointed out the consumer behaviour literature did not provide any generally accepted definition of image.

Arguably the most cited definition in destination image studies has been that suggested by Crompton (1979b, p. 18): "the sum of beliefs, ideas, and impressions that a person has of a destination". With this in mind, the thesis was interested in the conceptualisation of destination attractiveness proposed by Mayo and Jarvis (1981, p. 203), as a way of operationalising

destination image. Mayo and Jarvis were following the work of Goodrich (1978a) who used the Fishbein (1967) multi-attribute model to model destination preferences. Mayo and Jarvis suggested destination attractiveness “has a great deal to do with the specific benefits that are desired by travelers and the capability of the destination to deliver them”. From this perspective it is important to gain an understanding of what decision criteria will be used by the consumer-traveller when making differentiating destinations under consideration. Mayo and Jarvis proposed an individual would make a brand selection based on what is “important and relevant to them” (p. 68). This definition of destination attractiveness underpins the methodology section of the thesis, which is presented in Chapter 4.

### **What is the Process of Image Formation by Individuals?**

Ries and Trout (1981) argued our minds cannot cope with the daily flood of advertising and other media. In this regard the explosion in destination choice and destination publicity material has only served to increase confusion among potential travellers (Gunn, 1988). A central theme within the marketing literature has been the difficulty in which the mind has in dealing with this increasingly busy world. However, Jacoby (1984) argued that while consumers could become overloaded with information, they would not generally allow this to occur. Instead, coping mechanisms are developed. The need for simplified processing by the mind was implicit in the definition of image proposed by Reynolds (1965, p. 69): “The mental construct developed by the consumer on the basis of a few selected impressions among the flood of total impressions”. This suggested individuals developed simplified images through a creative process. This selective attention has been referred to as a form of ‘perceptual defence’ (Moutinho, 1987) and ‘subjective filtering’ (Mayo and Jarvis, 1981). Kotler, Haider and Rein (1993, p. 141) highlighted the way in which minds simplify the process of destination image formation: “Images represent a simplification of a large number of associations and pieces of information connected with the place. They are the product of the mind trying to process and essentialize huge amounts of

data about a place". The analogy of a mental filing system is therefore useful:

*Given that humans have limited information retrieval ability, even though they can store vast amounts of information, and given that past events are used to guide future decisions, then people need something that will simplify and structure their experiences. Images are one such mental structure that allows people to simplify experiences and yet have access to vast amounts of information (Cossens, 1994b, p. 581).*

Reynolds (1965) used the term 'indifundibular' to describe the funnel shaped process of image building, where elaborated images are creatively developed from impressions selected out of the message milieu. However, the 'black box' of how this filtering of cognitive information occurs in the internal brain processes to produce a composite image is not yet fully understood (Stern and Krakover, 1993). The same may be said of the process of destination image formation by individuals (Anderssen and Colberg 1973, Baloglu and McCleary 1999a).

Unfortunately for the marketer, images may only have a tenuous and indirect relationship to fact (Reynolds 1965). However, whether an individual's perceived images are correct is not as important as what the consumer actually believes to be true (Hunt 1975, Mayo 1973). This proposition continues to underpin positioning research today, and often referred to as 'perception is reality'.

Also, given a single fact, a consumer can create a detailed image of a product through simple inferences (Reynolds, 1965). One way this occurs is through plot value where certain attributes are seen by an individual to go together. In this way we construct a plot from a small amount of knowledge. Knowledge of a destination's location may enable the construction of an image including likely climate and geography. For example, New Zealand's location in the South Pacific may incorrectly stimulate an image of a tropical climate. A similar phenomenon may occur through the halo effect where a product that is rated highly on one attribute is then also assumed to rate

highly on others (Reynolds, 1965). The reverse may also apply. Wilkie and Pessemier's (1973) literature review found sufficient evidence of the halo effect in marketing studies to suggest that it may impair analyses of a brand's strengths and weaknesses. Pizam, Neumann and Reichel (1978) suggested a halo effect may occur at a destination where satisfaction, or dissatisfaction, of the total product is the result of an experience of one of its components.

Following these concepts is the formation of an overall or composite image (Ahmed 1991b, Baloglu and McCleary 1999a, Dichter 1985, Gartner 1986, MacInnis and Price 1987, Mayo 1973, Stern and Krakover 1993). MacInnis and Price described imagery as a process of the representation of multi-sensory information in a gestalt. Discursive processing on the other hand was the cognitive elaboration of individual attributes. Echtner (1991) proposed a key issue for destination image research was whether imagery or discursive processing is used to evaluate destinations. A parallel issue exists in the evaluation of the holiday experience – is there a holistic experience as proposed by Medlik and Middleton (1973), a sequence of separate experiences or a mixture of both. For example, from an analysis of travellers' diaries, Laws and Ryan (1992, p. 68) concluded an overseas flight was "experienced as a series of events which have varying influences on passenger satisfaction". In the view of Echtner and Ritchie (1991), the definitions of image used by destination researchers did not explicitly identify whether the interest was in a holistic image or in the individual attributes. They suggested most were using lists of attributes, although acknowledged a growing interest in measuring holistic impressions, such as work by Pearce (1988), Um and Crompton (1990) and Reilly (1990). Gartner (1986) suggested an overall destination image is formed based on the perceptions of individual attributes. The tourist may then use the overall image during destination selection decisions.

A further dimension of destination image introduced by Echtner and Ritchie (1991) was the issue of common functional attributes versus unique and psychological features. Since most of the studies they reviewed required

respondents to compare destinations across a range of common attributes, there was little opportunity to identify any attributes that may be unique to a destination. Echtner and Ritchie proposed a continuum between those common functional and psychological attributes on which destinations are commonly rated and compared, and more unique features, events or auras. However, unique features may not necessarily explain a destination's competitive position if they do not offer unique benefits in a specified travel context.

Crompton (1979b) suggested two schools of thought concerning destination image formation. Firstly, images are person-dominated. Variance will always exist as individuals have different experiences and process communications differently. On the other hand images can be destination determined, where people form images based on experience at the destination. This implied that a destination cannot do much to create an image that is different to what it actually is. Phelps (1986) proposed destination images were either primary or secondary. A primary image is developed from an individual's experience of a place, whereas secondary images are those held prior to a first visit. Geographers have commonly referred to images held of environments being either designative or appraisive (Stern and Krakover, 1993). The former use a cognitive categorisation of the landscape, while the latter are concerned with attitudes towards the place. These ideas were consistent with Gunn's (1988) organic/induced images, which, along with cognition, affect and conation, have been the most cited destination image formation concepts.

### **Organic and Induced Images**

Gunn (1988) suggested images were formed at two levels, organic and induced. The organic image is developed through an individual's everyday assimilation of information, which may include a wide range of mediums, from school geography readings to mass media to actual visitation. The induced image is formed through the influence of tourism promotions directed by marketers. This usually occurs when the potential traveller begins sourcing information for a holiday. The distinction between organic and induced images is the level of influence held by destination marketers. Gunn

suggested destination marketers should focus on modifying the induced image since they can do little to change the organic image. Gartner (1993) proposed a typology of image formation agents, with practical implications. These ranged in a continuum from overt induced advertising through to organic sources such as visitation. Marketers could use such agents independently, or in some combination, depending on the marketing objectives.

In the case of Ireland, Ehemann (1977) found an overwhelmingly negative image portrayed in both the hard news and general media. Ehemann was interested in the evaluative vocabulary used in the media about a destination, and the nature of the image that might be developed by an individual with no direct experience of a destination. Ehemann suggested this would become important to the DMO when the individual was in holiday decision-making mode.

Due to increasing use of PR, organic and induced images may not necessarily be mutually exclusive (Selby and Morgan, 1996). This is because news is more voluminous than advertising and has higher credibility (Crompton, 1979b). Not surprisingly, PR is now a key component of destination marketing. Images held of destinations may be either positive or negative, although in reality a destination image will usually consist of both positive and negative images. Not surprisingly positive images are more likely to be chosen in the holiday decision-making process (Fishbein and Azjen 1975, Goodrich 1978, Hunt 1975, Pearce 1982). Effective corrective marketing is difficult, and it has been suggested that once a negative image has become established, marketing activities will not be able to reverse it (Ahmed, 1991b). A number of case studies concerning this issue have been reported in the tourism literature. For example, Bramwell and Rawding (1996) reported on the challenges involved in attempting to change the negative image of Bradford, an English industrial city. In Wales, Selby and Morgan (1996) found that even after considerable redevelopments, Barry Island still had an image of being dirty and tatty. This may have reflected the organic perceptions held prior to the redevelopment. Similarly, Amor,

Calabug, Abellan and Montfort (1994) reported the image held of Benidorm remained negative, despite consumer and trade awareness of attempts to change it. Meler and Ruzic (1999), discussing the negative image of post-war Croatia, suggested one or a few negative attributes could stimulate the creation of a negative image of a destination. However, repositioning is not necessarily impossible. Buhalis (2000), for example, offered the examples of Las Vegas and the Calvia Municipality in Mallorca, both of which had been successful in repositioning away from being commodity destinations as previously defined.

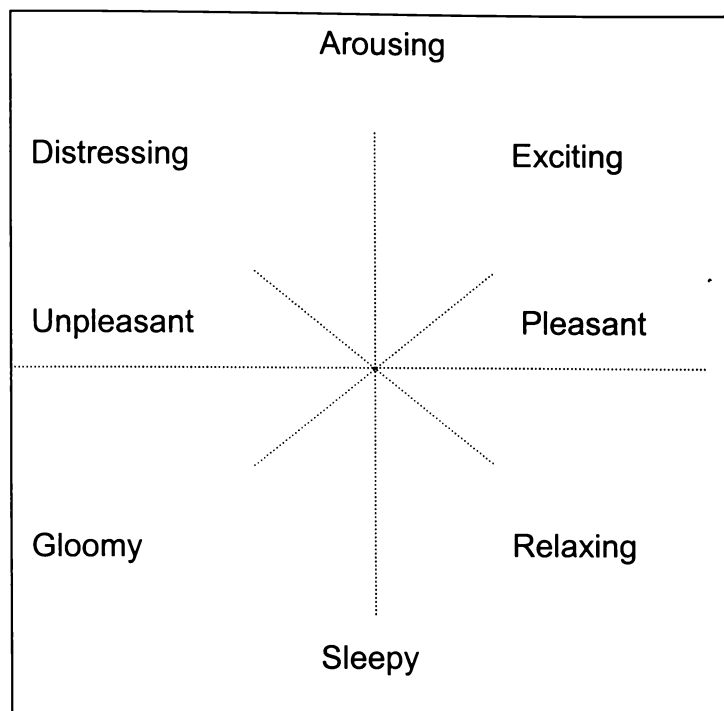
Echtner and Ritchie (1991) proposed that unlike the majority of products, where information sources are mostly commercial, destination images appear to be derived from a wider range of sources. They suggested therefore that Gunn's concept of organic and induced images was unique to destinations. There are two important implications of this. First, it is possible for individuals to have images of destinations that they have no direct knowledge of information through other means like that of commercially produced literature. Second, since such an image changes after visitation, it is important to separate the images held by visitors from those of non-visitors. Non-visitors will include those who would like to visit but have not yet been able to for various reasons. Destination image can be enhanced through travel to a destination (Chon 1991, Hu and Ritchie 1993, Hunt 1975, Pearce 1982, Wee, Hakam and Ong 1985). Milman and Pizam (1995) demonstrated how familiarity with a domestic USA destination, measured by previous visitation, led to a more positive image and increased likelihood of repeat visits. However, many studies of destination image have excluded those who have chosen not to visit (Ahmed 1991, Baloglu and McCleary 1999a). This has also been the case with New Zealand visitor data (Henshall, Roberts and Leighton, 1985). The literature review for the thesis found a minority of published destination image papers (55 of 142) sought the perceptions of consumers, which would enable the capture of non-visitors.

## **Cognition, Affect and Conation**

Fishbein (1967) and Fishbein and Azjen (1975) argued the importance of distinguishing between an individual's beliefs and attitudes. While beliefs represent information held about an object, attitude is a favourable or unfavourable evaluation. Fishbein was concerned both concepts were frequently subsumed under the term 'attitude'. Instead, it was proposed attitude comprises cognitive, affective and conative components. Cognition is the sum of what is known or believed about a destination, and may be organic or induced. Such knowledge or beliefs may or may not have been derived from a previous visit. A number of authors (see for example Milman and Pizam, 1995) have cited the World Tourism Organization's (1979) research finding that images can exist if there is only a small amount of knowledge present. Beliefs are usually permanent but may not always be important (Mayo and Jarvis, 1981).

Affect represents an individual's feelings toward an object, which may be favourable, unfavourable or neutral (Fishbein, 1967). Woodside and Lysonski (1989) found, for destinations in the evoked set, affect was almost all positive. Affect is usually operational at the evaluation stage of destination selection process (Gartner, 1993). Russel, Ward and Pratt (1981) pointed out that the number of terms used in the English language to describe affect toward a place would be in the hundreds. Following Russel (1980), Russel, Ward and Pratt factor analysed 105 common adjectives used to describe environments, and generated the affective response grid shown in Figure 2.2. Eight adjective dimensions of affect were included in the model, 45 degrees apart. The assumption was that these dimensions were not independent of each other, but represented a circumplex model of affect. The horizontal axis was arbitrarily set to represent pleasantness, while the vertical axis represents level of arousal. In this way 'exciting', which is a dimension in its own right, is a combination of arousing and pleasant, while 'distressing' is a function of arousing and unpleasant. This model of affect towards environments was also supported by Russel and Lanius (1984).

**Figure 2.2 Affective Response Grid**



**Source: Russel, Ward and Pratt (1981)**

Using four semantic differential scales, 'pleasant/unpleasant', 'relaxing/distressing', 'arousing/sleepy' and 'exciting/gloomy', Baloglu and Brinberg (1997) demonstrated how the affective response model could be applied to destinations. They used MDS to plot the affective positions of 11 Mediterranean destinations. Baloglu and McCleary (1999a) also reported the use of these four scales, while Baloglu and Mangaloglu (2001) used the four scales in an analysis of images held by travel intermediaries.

Russel, Ward and Pratt (1981) suggested two dimensions, 'sleepy/arousing' and 'unpleasant/pleasant', could be sufficient to measure affect towards environments. Other studies have demonstrated how this can apply to travel destinations. For example, Walmsley and Jenkins' (1993) principal components analysis of Repertory Grid data produced the same two factor labels. While Walmsley and Jenkins' results were based on Australian domestic destinations, a study by Walmsley and Young (1998) concluded the schema was appropriate for international destinations, but not significant for local destinations. However, Hanyu (1993) found pleasantness and arousing levels to be the dimensions of residents' affect towards Tokyo.

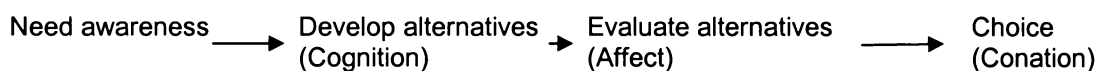
Wilkie and Pessemier's (1973) definition of affect bears a striking similarity to Fishbein's summative multi-attribute model and the definition of destination attractiveness of Mayo and Jarvis (1981):

*Overall affect is posited to reflect the net resolution of an individual's cognitions (beliefs) as to the degree to which given objects possess certain attributes weighted by the salience (importance) of each attribute to the individual (Wilkie and Pessemier, 1973, p. 428, brackets as in the original).*

The evaluative image component has been overlooked in tourism (Walmsley and Young, 1998). The majority of destination image studies have focused on cognitive attributes (Pearce 1977, Walmsley and Jenkins 1992). Only recently have destination studies studied both cognition and affect towards destinations, together (see Baloglu 1998, Baloglu and McCleary 1999a, Dann 1996a, MacKay and Fesenmaier 1997). The literature review found only 6 of the 142 published destination image papers showed an explicit interest in affective images.

The conative image is analogous to behaviour since it is the intent or action component. Intent refers to the likelihood of brand purchase (Howard and Sheth, 1969). Conation may be considered as the likelihood of visiting a destination within a given time period. Woodside and Sherrell (1977) found intent to visit was higher for destinations in the evoked set, as did Thompson and Cooper (1979). Figure 2.3 highlights how the cognition/affect/conation relationships apply in decision-making. The process is similar to the AIDA model used by advertisers, where the aim is to guide a consumer through the stages of awareness, interest, desire and action.

**Figure 2.3 Cognition/Affect/Conation**



**Source: Myers (1992)**

Myers (1992) acknowledged the model might not always progress in this manner, since preferences may not need any cognitive antecedents. Therefore the process could begin at any stage of the model. Manstead (1996) suggested cognition, affect and conation toward an object would be correlated. However, this may not always be so, due to intervening or moderating variables (Fishbein, 1967). In tourism, Woodside and Lysonski (1989) suggested that preferences in the destination decision process are based on a combination of cognitive and affective associations. Baloglu and McCleary (1999a) found cognition, affect and overall image positively influenced intent to visit a destination. Baloglu (1998) found affect influenced intent following experience at a destination.

## **Chapter Summary**

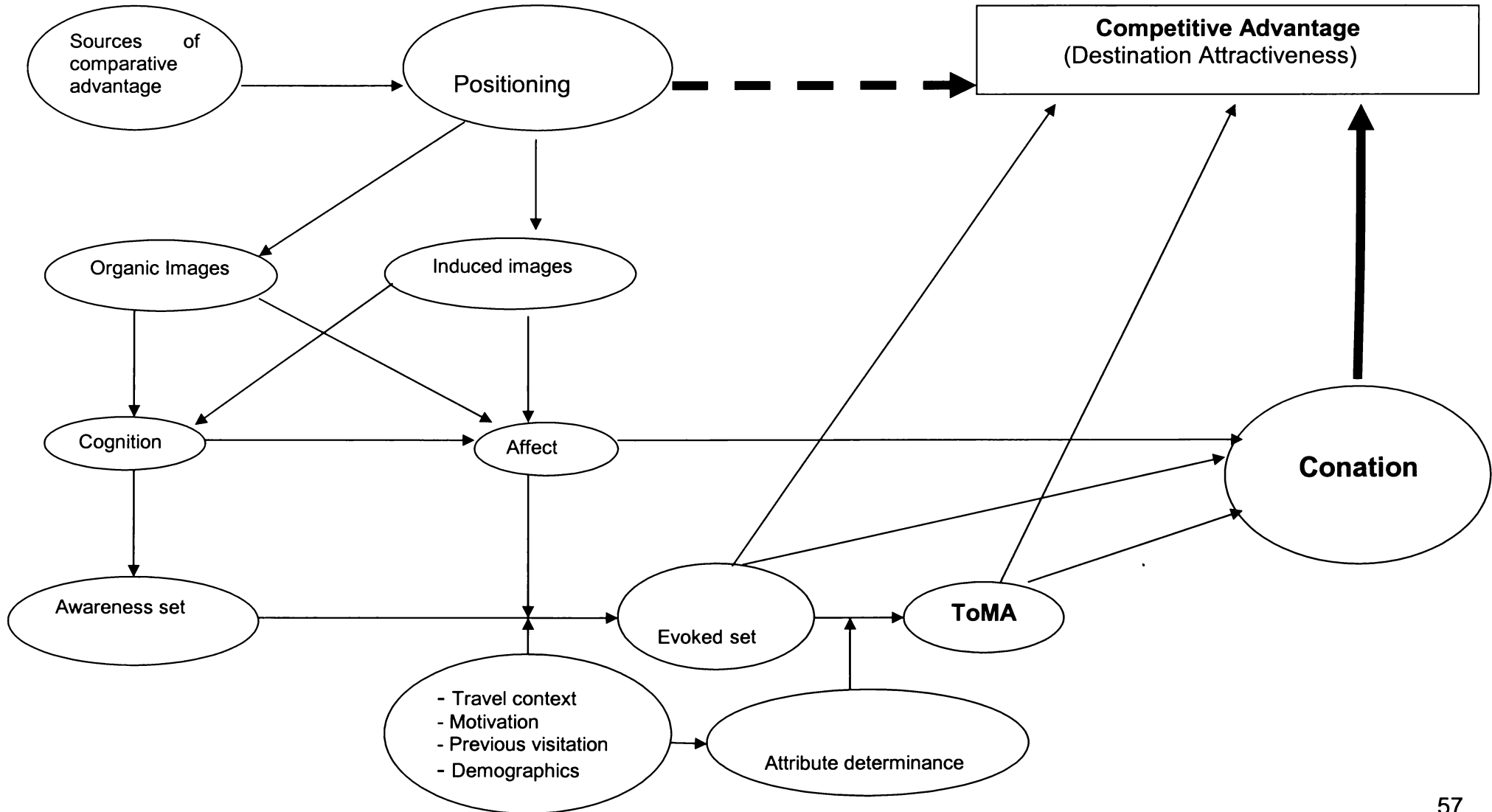
Destinations are an integral part of the tourism industry, since they represent the focus of most travellers' activities. The appreciation of the economic benefits of tourism has resulted in thousands of DMOs competing for attention. Both consumers and travel trade are bombarded with an overwhelming deluge of information on a daily basis. The key challenge for DMOs is positioning a multi-attributed product in a dynamic and heterogeneous world. DMOs must not only achieve 'cut through' with a focused message but they must also somehow differentiate their offering from rivals at a time when globalisation has led to an increased commoditisation of destinations.

Positioning ultimately takes place within the mind of the individual consumer, and the image of a destination plays a critical role in the selection process. While image formation is not fully understood, the process is thought to be simplified, so that only a very limited range of destinations will actually be considered when travel is contemplated. This reduced number of destinations is referred to as the decision set. A hierarchy exists within this decision set. The destination mentioned first in unaided awareness research is indicative of top of mind awareness (ToMA), which is a strong indicator of purchase preference. The destination chosen is likely to be from within the decision set. Overseas studies have suggested decision sets comprise three

to four destinations. Woodside and Lysonski's (1989) model of destination choice proposed two exogenous variables influencing composition of destinations in decision sets, i.e. traveller and marketing activity variables. It was suggested that positioning may influence membership of decision sets. Therefore, it is proposed a market position, based on offering benefits desired by the target, represents a potential source of comparative advantage.

Drawing on the issues presented in the chapter, a descriptive model summarising positioning as a source of competitive advantage for destinations is presented in Figure 2.4. This thesis proposes a new component within the literature, that of Top of Mind Awareness (ToMA). This is differentiated from an evoked set by reason of it being the unsolicited subset of an actual set of impressions that lead to predisposition to action. ToMA is also contextualised within an experiential and actionable context specific to a current state of being induced by sets of consciousness inherent in holiday destination selection, as is shown in Figure 2.4.

Figure 2.4 Positioning as a Source of Competitive Advantage



## **Implications for the Thesis**

The issues raised in the chapter present a number of important implications for the thesis. These include: the limited number of New Zealand destination positioning studies, the importance of travel context in image analysis and decision set composition, the emergence of short break holidays, the temporal effects of image change, the relationship between projected and perceived destination images, and operationalising the conceptualisation of the destination position construct.

### **Limited New Zealand Studies**

A significant number of the 142 destination image papers reviewed from the published literature were based on destinations in North America (58 of 142). Other papers, some of which included destinations from more than one region, covered: UK/Europe (45), Asia (25), Australia (17), Africa/Middle East (14), Central America/Caribbean (9), South Pacific (5), and South America (1). Only two of the 142 papers were concerned with New Zealand destinations. Lawton and Page (1997) examined whether the images promoted by individual Auckland tourism operators were at variance with both the actual images held of the destination and the brand promoted by the RTO. Driscoll and Lawson (1990) examined how New Zealand was positioned, as an international travel destination, by local university students.

Three further New Zealand destination image studies were sourced: Kearsley, Coughlan and Ritchie's (1998) report explored images held, by international and domestic visitors, of 20 New Zealand towns and cities. Cossens' (1989, 1994) masters and doctoral theses investigated the position of Queenstown as a domestic holiday destination.

The thesis therefore represented an opportunity to provide a contribution to a region with few previous destination image studies. A decade ago, Driscoll and Lawson (1990, p. 117) commented on the dearth of domestic travel research in

New Zealand: "The domestic market as a whole has received bridesmaid status behind the satisfaction of international tourists' needs and wants, yet the success of domestic tourism is vital to the entire industry". Despite the value of domestic tourism there has been little research undertaken in New Zealand in the decade following this criticism (Goh and Fairgray 1999, Lawson, Thyne and Young 1997, TIANZ 1999, Hall and Kearsley, 2001). One reason for this inertia is the NTO is only concerned with offshore markets: "Tourism New Zealand is not funded to carry out research into domestic tourism in New Zealand" ([www.tourisminfo.govt.nz](http://www.tourisminfo.govt.nz), 20/8/00).

## **Travel Context**

Attribute importance will vary between segments and situations (Barich and Kotler 1991, Crompton 1992). Therefore travel context will be an important variable. Context in this instance is the specific usage of the product. In tourism, travel may be used for many different purposes, including, but not limited to: business, conference attendance, incentive tours, summer holiday, honeymoon, visiting friends and relatives, sporting event, shopping, winter holiday and short break holiday. In some cases, it is the activity and not the destination that influences travel behaviour. Golf excursions, for example, may act as both the catalyst for travel and the destination choice (Woodside, 1999). Phelps (1986) found visitors to Menorca had a low awareness of the destination they were travelling to on a package tour, since the package product was more important than the destination. Alford (1998) cited research commissioned by the English Tourist Board, which found consumers were most likely to be influenced by the type of holiday or activity, whereas RTBs were promoting regions or towns. The research suggested consumers found RTB brochures confusing, and that tour operators' brochures were better because they tended to specialise in the type of holiday. Alford found RTBs generally still produced the regional brochure as if trying to be all things to all people.

It has been proposed anticipated usage situations affect brand perceptions. For example, Belk's (1975) analysis of six product categories found that brand purchase was determined by situational influences. Miller and Ginter's (1979) investigation of situation determinants on brand choice found context becomes important to marketers when the strengths and weaknesses of a brand differ between situations. However, there has been limited attention to the importance of context in consumer research. In an assessment of the tourism marketing research 'state of the art', Ritchie (1996, p. 62) proposed ten key shortcomings: "Unfortunately, as we all know, there are a number of areas which we prefer not to acknowledge, or which we manage to ignore on a fairly regular basis". Among the gaps, which Ritchie labelled the 'dark side of the universe', was travel context. Destination image studies have generally been undertaken without explicitly defining the context in which the traveller decision is being made (Hu and Ritchie, 1993). The majority of destination image papers reviewed for the thesis did not take into account any specific travel context, even though it was proposed three decades ago that any list of determinant destination attributes will vary depending on situational context (see Gearing, Swart and Var, 1974). Only 23 of the 142 published destination image papers were explicit about a travel context of interest. These are highlighted in Table 2.3.

Hu and Ritchie (1993) claimed the first destination image research to focus on the manner in which the perceived attractiveness of a particular destination varies with travel context. An evaluation of five destinations, using two different contexts, found differences in overall attractiveness, and individual attribute performance. Hu and Ritchie's work supported previous findings in other tourism studies of context in dining choice (see Miller and Ginter, 1979) and airline services (see Ritchie, Johnston and Jones, 1980). This was important for the thesis since it is possible the perceptions of domestic destinations may differ between long and short holidays.

**Table 2.3 Destination Image Papers with an Explicit Travel Context**

<b>Author(s)</b>	<b>Year</b>	<b>Travel Context</b>
Mayo	1973	Self drive
Anderssen & Colberg	1973	Overseas winter holiday
Dillon, Domzal & Madden	1986	Student Spring break
Perdue	1986	Boating
Woodside & Carr	1988	Foreign travel
Woodside & Lysonski	1989	Foreign travel
Embacher & Buttle	1989	Summer holiday
Chon, Weaver & Kim	1991	Short break
Crompton, Fakeye & Lue	1992	Winter long stay
Javalgi, Thomas & Rao	1992	Self drive
Hu & Ritchie	1993	Education travel
Amor et al.	1994	Sun/beach
King	1994	Sun/beach
Oppermann	1996b	Convention
Go & Zhang	1997	Convention
Hudson & Shephard	1998	Snow skiing
McClellan	1998	Short break
Ritchie	1998	Bicycling
Vaughan & Edwards	1999	Overseas winter holiday
Baloglu & McCleary	1999a, 1999b	Summer holiday
Murphy	1999	Backpacking
Chacko & Fenich	2000	Convention

## **Short Break Holidays**

Short breaks, which have been referred to as a “new form of recreation” (Fache, 1990, p. 5), have emerged relatively recently as a significant holiday trend in Europe (Euromonitor 1987, Fache 1990, Ryan 1983) and North America (Kotler, Bowen and Makens 1998, Plog 2000). The focus of short break research in the UK has been commercial hotel packages (see for example Ryan 1983, Davies 1990, Edgar, Litteljohn, Allardyce and Wanhill 1994, Middleton and O’Brien 1987, Teare, Davies and McGeary 1989, Edgar 1997). Ryan (1983) discussed the introduction of domestic weekend-break packages, by UK hotels, as one of a range of initiatives to counter static domestic and international visitor growth during the late 1970s. By the 1990s commercial short breaks in the UK had evolved from an off-season contribution towards fixed costs, to an all-year growth market (Edgar et al, 1994). Lohmann (1990, 1991) claimed short breaks were growing at a faster rate than other holiday types in Germany, Austria and the Netherlands. In an economic perspective Gratton (1990) found short breaks generated the highest per day spend in Europe. Gratton suggested increases in

the number of short breaks taken each year had reversed the decline in domestic tourism experienced in many European countries during the 1970s. Euromonitor (1987) suggested increases in leisure time and disposable income had led to one or more shorter holidays being taken each year, which supplemented the annual holiday. It was estimated that almost one third of people took more than one such break per year at that time, and that 40 per cent of all holidays taken were short breaks. The report suggested short breaks in the UK were less seasonal than longer holidays, and that three quarters of domestic short breaks were by private car. In New Zealand it has been estimated that about 80 per cent of domestic travel uses private vehicles (Forsyte Research, 2000). Fache (1994) summarised the following characteristics of short breaks in Europe:

- Short breaks do not replace annual holidays.
- Destinations are usually within the home country.
- Private cars are the main form of transport.
- Short breaks are taken throughout the year.
- Short break takers are relatively high spenders.
- Short breaks are usually a spontaneous decision.

As previously shown in Table 2.3, only two of the 142 destination image papers reviewed had indicated an interest in short break holidays. Chon, Weaver and Kim (1991) investigated the image of Norfolk, Virginia as a 'mini-break' destination, while McClellan (1998) analysed perceptions of Cherbourg as a potential short break destination for French and English travellers.

New Zealand may also be experiencing the emergence of short break holidays (Hall and Kearsley 2001, TIANZ 1999). For example, it has been suggested that the length of stay for domestic travel in New Zealand declined from 4 nights in 1989/90 to 3.2 nights in 1999 (Forsyte Research, 2000). However, little if any research has been undertaken in New Zealand's domestic short break market.

Short break holidays appear to lack an internationally recognised definition, although Fache (1994) and Euromonitor (1987), like Ryan (1983), suggested that in Europe they are short holidays of up three nights. For the thesis a short break has been defined as a non-business trip of between one and three nights duration, away from the home environment. This therefore excludes day-trips. The thesis context has also been narrowed from short breaks in general, to domestic trips taken by car. For New Zealanders, other short break options could include nearby international destinations. For example, by the beginning of the 1980s Australia was becoming less regarded as an overseas trip for Aucklanders (NZTP, 1981). Other short break options include domestic destinations accessible by air, such as Wellington or Christchurch. There is a significant gap in the New Zealand literature on how domestic destinations are positioned in the short break market. This is important, since the way the way in which travellers choose a short break may be quite different to the way the main holiday is chosen (Seaton, 1994).

## **Evoked Decision Sets**

The decision set indicates which brands have an affinity with each other in the context of a purchase decision (Wilson, 1981). Therefore an important consideration in the examination of ToMA and evoked sets is that of travel context. Crompton (1992) suggested decision sets were most applicable for high involvement decisions and may not apply to shorter near-home holidays. However, Narayana and Markin (1975) suggested the concept was relevant to basic consumer goods, such as toothpaste and beer, which feature a number of similar brands. Thompson and Cooper (1979) noted that 'no tourism study had examined the effect of travel context on evoked set size. Also, the literature review was not successful in identifying any investigations of decisions sets for short break holidays in the literature. Likewise, the issue of ToMA did not appear to have been applied to short break destinations. Also, no New Zealand study of decision set composition was sourced. It may be that the number of available near-home destinations in New Zealand would be significantly more than those included in the decision set for longer holidays. Woodside and Sherrell (1977) cited evidence from Jarvis and Wilcox (1974), which suggested the larger the

awareness set the larger the evoked set would be. Differences may also exist in decision set sizes between Aucklanders and the samples used in the overseas studies. For example, Woodside, Ronkainen and Reid (1977) found differences between the evoked set sizes of respondents from Finland and those from the USA.

## **Temporal Effects**

Dichter (1985) used the example of 'Made in Japan' to demonstrate how images can and do change over time. However, it has been suggested that while individual components of a destination image may fluctuate greatly over time, their effect on overall image may not be important (Crompton 1979b, Gartner 1986). Gartner and Hunt (1987) found evidence of positive destination image change, but concluded any change only occurs slowly. Gartner (1993) proposed the larger the entity the slower the image change. This supports the proposition that it is difficult to change peoples' minds. While Cossens (1989, 1994) explored the temporal image of Queenstown over a five-year period, no study in New Zealand has monitored changes in decision set composition over time. The thesis represents an opportunity to benchmark decision sets of short break destinations in the Auckland market.

## **The Relationship between Projected and Perceived Images**

There has been a lack of research into the relationship between projected and perceived destination images (Ashworth and Goodall 1990b). Recently, Andreu, Bigne and Cooper (2000) concluded images projected by destinations may have long lasting effects on consumers. They promoted the value of tracing the evolution of such campaigns. Also, Buhalis (2000) pointed out that most destinations have a rich history that needs to be taken into account during the marketing planning process. Chapter 3 presents an examination of the history of projected images from Rotorua, the destination of interest.

## Thesis Propositions

To test the model of positioning as a potential source of competitive advantage, presented in Figure 2.4, the following propositions were developed:

1. The leading destination, in terms of Auckland visitor nights, would achieve the highest conation.
2. The leading destination, in terms of Auckland visitor nights, would achieve the highest ToMA response level.
3. The destination achieving the highest ToMA level would also achieve the highest conation scores.
4. The leading destination, in terms of Auckland visitor nights, would achieve the highest level decision set membership.
5. Conation towards Rotorua would be highest for the respondents listing the destination as ToMA choice.
6. The highest-ranking ToMA destination(s) would perform strongest on the determinant attributes.
7. The number of domestic short break destinations in the decision sets of Aucklanders would be greater than four, due to familiarity with the compact geography of New Zealand.
8. However, decision set size would still be limited to seven plus or minus two, in keeping with the psychology literature.
9. Differences in the cognitive, affective and conative images of Rotorua would exist between non-visitors and previous visitors.
10. Affect towards Rotorua would be associated with motivation for a short break.
11. Affective images would be positively associated with conative images.
12. ToMA would be associated with cognitive, affective and conative images towards Rotorua.

# Chapter 3 - Evolution of Rotorua's Destination Promotion

## Introduction

In an effort to examine the relationship between projected and perceived images, the purpose of this chapter is to summarise the evolution of Rotorua as a destination, in an attempt to identify key factors contributing to the development of Rotorua's current image in the Auckland market. The chapter begins with a general introduction to Rotorua. This is followed by a brief analysis of the key stages in the destination's evolution. The main body of the chapter then discusses the following key themes, which are considered significant issues for the thesis: Rotorua's first destination branding, the 'Royal visit', the spa vision, Rotorua's reliance on central government, RTO promotions, and recurring negative images. The chapter concludes with a summary of factors contributing to Rotorua's touristic image in the domestic market.

## The District of Rotorua

Rotorua is a provincial city/rural district located in the centre of New Zealand's North Island, approximately 240 kilometres south of Auckland and 440 kilometres north of Wellington, New Zealand's capital. A map of New Zealand, showing Rotorua's location, is presented in Figure 3.1. The Rotorua City Council and Rotorua County Council merged in 1979 to form the Rotorua District Council (RDC). This political boundary encompasses some 2,500 square kilometres, and boasts a diverse landscape including 17 lakes, rivers, a volcano, sheep and dairy farmland, exotic forests, and geothermal fields. The Rotorua district is the 16<sup>th</sup> most populated of New Zealand's 74 territorial authorities, with a population of 64,473 recorded in the 2001 census ([www.stats.govt.nz](http://www.stats.govt.nz)). Rotorua boasts New Zealand's 5<sup>th</sup> largest Maori population. Thirty six per cent of residents (21,609) identified themselves as Maori. The unemployment rate for Maori in Rotorua is 17.3 per cent, compared to 8.9 per cent for Rotorua's total population.

Figure 3.1 - Map of New Zealand



Source: [www.govt.nz/aboutnz/nzmap.php3](http://www.govt.nz/aboutnz/nzmap.php3), 18/9/02

Rotorua's main industries are tourism, agriculture and forestry. Other sectors include light manufacturing and retail. Outside of the international gateways of Auckland, Wellington and Christchurch, Rotorua is New Zealand's most popular destination in terms of visitor numbers, featuring arguably the largest range of tourism facilities ([www.rotoruanz.com](http://www.rotoruanz.com)). While tourism has clearly been important

to the Rotorua economy, there is little historical evidence of any attempts to quantify the contribution. The first in-depth analyses of tourism in the Rotorua economy were commissioned by Tourism Rotorua (see APR 1991, APR 1994). These reports provided benchmarks on the value of tourism. Table 3.1 highlights key tourism contributions to the Rotorua economy. For example, by 1994 one in every five local jobs was in tourism, double the world and New Zealand averages. Another important finding was that an estimated 1000 new tourism jobs had been created in Rotorua between 1989 and 1994. Recently, Fairweather and Simmons (2000) estimated that in 1999 direct visitor spend was \$310 million and direct full time equivalent jobs numbered 3,500.

**Table 3.1 Value of Tourism in Rotorua: 1989 and 1994**

	<b>1989</b>	<b>1994</b>
Direct visitor spend	\$191 million	\$249 million
Indirect spend by tourism businesses within Rotorua	\$100 million	\$200 million
Domestic visitor spend	\$91 million	\$114 million
Proportion of domestic spend to total visitor spending	48%	46%
Full time equivalent tourism jobs	3485	4500

Source: Adapted from APR (1991, 1994)

An important measure of Rotorua's tourism progress has been counting the number of tourists. For example, records indicated Rotorua attracted 1250 tourists during the 1883/84 'season' (Stafford, 1986). Unfortunately, detailed visitor numbers to the district were not maintained by the New Zealand Tourist Department after 1908 (Reggett, 1972). However, it is known that by 1950 there were 14,716 overseas tourists visiting Rotorua, and 36,557 in 1960 (Rotorua Public Relations Office, 1960). The 1960s saw significant increases. In 1962, overseas visitors had increased to 75,000, out of a total of 247,000 visitors to the town (Rotorua Public Relations Office, 1963). After much consultation, often heated due to wariness by local industry, Tourism Rotorua initiated a visitor monitor programme, to track monthly visitor flows, in July 1991. The monitor was only the second of its type in New Zealand, after the launch of Queenstown's six months earlier. A Rotorua attraction monitor took longer to negotiate and was finally established in December 1998. From July 1992 Rotorua, for the first time, had reliable comparative data with the previous year. Most other regions did not commence visitor monitors until 1994. Prior to this time, estimates of visitor flows

had been based on nationwide surveys by NZTD, which were of questionable value to Rotorua. NZTD estimates were based on provincial boundaries, where Rotorua, for example, was part of the Bay of Plenty region. Bay of Plenty also included Tauranga/Mt Maunganui, Whakatane, Te Puke and Opotiki. Moore, Fairweather and Simmons (2000) suggested Tourism Rotorua had the best visitor statistics collection procedures in New Zealand. Rotorua currently attracts approximately 1.3 million visitors annually ([www.rotoruanz.com](http://www.rotoruanz.com), 13/9/02).

While the accommodation monitor included commercial and private accommodation, details of some visitors were not captured. Tourism Rotorua commissioned a one-off study to determine the number of visitors who were not accounted for in the visitor monitor, for the year ending June 1995. The following annual estimates were proposed (APR 1995b): 15,000 visitor nights spent on local Marae, 50,000 to 60,000 day-trippers via Auckland tour operators, 200,000 visitor nights in holiday homes, 200,000 day-tripper shoppers, and 15,000 day-tripper sports participants.

## **Key Tourism Development Stages**

Rotorua has a short-recorded history by international standards. The township was officially created in 1880, through the Fenton Agreement with Ngati Whakaue. An integral part of the Thermal Springs Districts Act, the Fenton Agreement saw land become available for European settlement in Rotorua for the first time (Stafford, 1986). However, the land where the township was to be sited was hardly prime real estate. It was previously thought by local Maori to be uninhabitable, and nearby Ohinemutu was only a small village settlement (Stafford, 1986). Only (1985, p. 9) cited an Auckland journalist's comments on the announcement of plans to establish Rotorua: "The embryo Rotorua of the future looks as miserable and godforsaken a place as ever the stupidest perversity of man, dressed in a little brief authority, selected for the abode of a civilised community". Unfortunately, much of the recorded history of Rotorua has either been lost or is housed in private collections. For example, all local newspaper back-copies from the 19<sup>th</sup> century to 1935 were taken to the local rubbish tip (Don Stafford, personal communication, March 2000). However, elements of tourism history have been

retained in collections and works of local historians, including the Don Stafford Collection, now housed at the Rotorua Public Library. Following Reggett (1972) it is proposed there have been six key stages in the development of Rotorua's tourism industry:

### **1839-1870**

While Rotorua did not officially exist as a town, it was during this period that the district was first 'explored' by non-Maori. The primary reason for the initial visitation was the Pink and White Terraces. Although these were two separate terraces, both were located on the shores of Lake Rotomahana and often referred to as one entity. The terraces were formed from mineral deposits in the water. A feature of the terraces was opportunity for visitors to bath in the natural recesses of the terraces.

Visitors would travel by foot or horse to Lake Tarawera, where guides would steer them in tourist boats, crewed by local Maori, across to a small isthmus adjoining Lake Rotomahana. It has been said that no-one who ever visited them possessed the words to adequately describe their beauty (Stafford, 2000). Warbrick (1934, pp. 30-31) cited a description of the White Terrace provided in an 1851 book entitled *Journal of an Expedition Overland from Auckland to Taranaki*:

*The spring of boiling water is at a height of about eighty feet from the level of the lake, and is contained in a large and nearly circular basin, surrounded by a steep cliff at the back; but on the side nearest the lake a regular succession of small semi-circular basins, one below the other, like steps of pure white marble, descend to the level of the lake. These steps have been formed by a deposit left by the water, which is constantly overflowing from one basin to the other. The deposit is perfectly white...So great is the quantity held in solution by the water which issues from the spring that, with the reflection of the blue sky overhead, it has exactly the hue of opal and is semi-opaque; so thick it is impossible to see the bottom of any of the basins, the depths of which vary from eight feet to eighteen inches.*

The terraces were even incorrectly claimed by many to be the eighth wonder of the world (Conly, 1985). Apart from the Pink and White Terraces there were few

other tourist attractions in New Zealand at this time (Reggett, 1972). However, travel conditions in and around Rotorua were rough, with tracks suitable for horse and foot traffic only. Accommodation was limited to the hospitality of missionaries and local Maori. Visitors were predominantly wealthy overseas tourists or members of the military. A visit to the terraces usually required a minimum of three days at this time.

### **1870-1886**

In 1870 the visit of royalty, the end of the colonial land wars, and the development of commercial accommodation, heralded the beginning of an important era for Rotorua tourism. The royal visit led to Rotorua being 'discovered' by British society. This was the period when the reputation of the Pink and White terraces became established:

*The great literary figures and painters visited them and recorded their experiences in their writings, or on film, or canvas. It is impossible to say now, how many people came to the area simply because it appealed to their vanity to be able to say that they had been to the same place as the Duke of Edinburgh, or Mark Twain (Reggett, 1972, p. 65).*

Travel conditions to Rotorua were improving. For example, by 1872 "a jolting ten hour coach trip" had been established between Tauranga and Ohinemutu (Savage, 1986, p. 16).

### **1886-1939**

The 1886 eruption of Mount Tarawera shaped this turning point, through the destruction of the Pink and White Terraces. Even though they were completely obliterated by the eruption, the terraces had by that time established a rudimentary pattern of tourism in Rotorua (Reggett, 1972). Significant central government resources were responsible for the development in infrastructure and tourism products during this period. A key focus of tourism development was the development of spa facilities.

## **1939-1960**

Not surprisingly, World War Two altered the course of tourism development in Rotorua. Most significant during this period was the demise of the spa vision. Instead, Rotorua was forced to refocus on those attractions and amusements that had occupied the spa tourists during their visits.

## **1960-1988**

As with many destinations worldwide, visitor arrivals to Rotorua increased exponentially during the 1960s through the introduction of wide-bodied jet aircraft for international travel. However, a number of economic and social challenges hampered growth of the local tourism industry, including recession, economic reforms, negative media, geothermal bore closures and changing travel patterns. Collectively, these forces led to a crisis point for Rotorua's visitor industry in 1988. Interestingly, Agarwal (1997, p. 65) suggested that traditional British seaside resorts faced a similar change in fortune during the 1970s and 1980s due to competition, cheap travel and more discerning travellers.

## **1988 – 2002**

During this period, Rotorua civic leaders and the tourism industry responded to the challenges and reached new levels of maturity, independence, and internal co-operation. This was stimulated by local authority investment in infrastructure redevelopment and destination marketing, and might be regarded as a period of rejuvenation. At the time of submitting the thesis it was not known what level of lasting impact the September 2001 terrorism actions, ensuing war in Afghanistan, conflict in Israel and possible USA invasion of Iraq might have on Rotorua's tourism development. For example, New Zealand's international visitor arrivals declined in the months of October and November 2001 and the geographic origin of visitors changed. In Rotorua uncertainty about the future had led to cancellations from some overseas markets, as well as cancelled participation at overseas trade missions by Rotorua tourist operators. By December 2001 media reports suggested more than 135,000 airline jobs had been lost world-wide (The Daily Post, 31/12/01). Would this represent a short-term deviation, or would a longer-term change manifest as a result of uncertainty?

# The Thermal Wonderland – Rotorua’s First Branding?

Rotorua’s first European visitors were probably the trader Hans Tapsell, around 1830 (Cowan, 1935), and missionary Reverend Thomas Chapman in 1835 (Stafford 1986, Tapsell 1972). In terms of visiting the district to take in the sights, the first tourist was thought to be naturalist John Bidwell, in 1839, who later published the book *Rambles in New Zealand* (Stafford, 1977). There has been debate about who was the first tourist to visit the Pink and White Terraces. For example, since Bidwell’s book contained no reference to the terraces, it is assumed that he did not visit them (Reggett, 1972). Reggett suggested that while Chapman visited the terraces some time between 1839 and 1841 the first tourist to do so was Dr John Johnson in 1846. Andrews (1995) claimed naturalist and surgeon Ernst Dieffenbach, and his assistant, set foot on the terraces in 1840.

The systematic colonisation of New Zealand began in the 1840s (Cushman, 1990), and the first settlement of Europeans at Ohinemutu occurred about 1856 (Tapsell, 1972). Reggett (1972) noted the first records of local tourist guides being paid was in 1858. By this time, the potential of Rotorua’s hot waters was attracting attention. In 1859 the Auckland Provincial Government commissioned Austrian Geologist Dr Ferdinand Von Hochstetter to prepare a report on the ‘Natural Characteristics of the Thermal Area’ in southern Auckland (Reggett 1972, Tapsell 1972). It was during this period that Rotorua was first described as ‘The Thermal Wonderland’ (Stafford, 1977). This was arguably the district’s first destination branding. Von Hochstetter was credited with generating much interest in the region, particularly in the scientific community, and produced the only pre-eruption map of Lake Rotomahana (Reggett, 1972). It is unfortunate that no survey was ever undertaken however, as the exact location of the Pink and White Terraces will never be known (Warbrick, 1934).

Until 1870 the few visitors to Rotorua were usually hosted by missionaries, and by local Maori who constructed a special whare at Ohinemutu for this purpose (Stafford, 1986). This early entrepreneurial initiative was the subject of comment in the local press a century later: “Accommodation was provided in a Maori whare

which was owned, and the business run, by five Maoris” (Daily Post City Celebration Issue 25/1/63, p. 60). Stafford reported the unusual practise the Maori owners employed to divide the proceeds:

*The business capacity of this firm was very limited, and there is a tradition that on receipt of every item of 1s. 6d., they at once divided the money, each receiving 3½ d, and tossing for the remaining odd halfpenny.*

## **The Royal Visit to the ‘Hot Lakes District’**

The Maori wars arrived in Rotorua in 1865 (Tapsell, 1972). Not surprisingly, this slowed the rate of tourist traffic for the next five years (Reggett, 1972). The last battle fought in Rotorua took place in 1870 (Rotorua Public Relations Office, 1963b). This was the same year the visit of the Duke of Edinburgh and accompanying media was credited with stimulating the first real growth of tourist traffic to the district (Steele, 1980). The Duke’s visit is said to have established Rotorua in the wealthy social circles of America and Europe, and led to increased interest in the Pink and White Terraces (Reggett, 1972). Reggett suggested Ohinemutu’s European population was about 200 at this time, including 40 armed constabulary.

Three accommodation houses were built in 1870, beginning the first form of commerce in the Rotorua district (Stafford, 1986). One of these, The Ohinemutu, still exists in a modified form (Tapsell, 1972), now known as the Lake Tavern. Also significant in 1870 was the first district’s first telegraph connection (Stafford, 1977) and the beginning of a decade of mass migration from Europe to New Zealand (Cushman, 1990).

A Thomas Cook representative visited Rotorua in 1880, and had signed up a local agent by 1882 (Stafford, 1986). Stafford reported that Rotorua was also being referred to at this time as the ‘Hot Lakes District’. The ‘Hot Lakes District’ had become an established part of the grand tour of the colonies (Savage, 1986). However, not all visiting gentry were impressed with the accommodation at

Ohinemutu, as evidenced in a letter by Sir William Herries, following a visit in 1882:

*The hotel accommodation is not good there. In fact the hotel we were at, though the largest, was quite the worst I have been into in the colony. They have just laid out and sold a township close to Ohinemutu, so perhaps something better may be built (Morris, 1969, p. 23).*

The Pink and White terraces were Rotorua's main attractions, since geothermal activity could be seen elsewhere (Conly, 1985). However, disaster struck in June 1886 when Mount Tarawera erupted, destroying three Maori villages with the loss of 150 lives, and obliterating the terraces. This was a devastating blow for tourism (Stafford, 1986), only 40 years after the first tourist arrivals. However, by 1888 Rotorua's annual visitor arrivals were higher than pre-eruption levels (Reggett, 1972). Part of the continued interest in Rotorua was the eruption aftermath and new volcanic craters, which remain attractions today. This is evidence of Ahmed's (1991b) suggestion of a dark side to image marketing, where some travellers are attracted to the negative images of places that have suffered disasters. Recently, Lennon and Foley (2000) labelled this phenomenon 'dark tourism', where tourists visit scenes of death and disaster for reasons of remembrance, education or entertainment. Their text provided examples of such sites in Europe and USA, including: the death camps of Poland, World War Two occupation sites in the Channel Islands, the death site of US President John F. Kennedy, war sites and the US Holocaust Memorial Museum.

After the eruption, other geothermal areas attracted visitors to Rotorua, although their features did not compare with the terraces. Indeed, during the 1870s there were a number of reports of tourists being unimpressed with Whakarewarewa, in comparison to the terraces (Reggett, 1972). Andrews (1995) claimed that, to avoid an anticlimax, visitors were advised if they wanted to see Whakarewarewa, such a visit should only take place after the trip to the terraces. Reggett (1972) proposed this was the start of a period of diversification for the local tourism industry. Interest was directed towards the therapeutic values of remaining geothermal features (Stafford, 1986).

## The Spa Vision – ‘Sanatorium of the Earth’

The raw potential of Rotorua’s geothermal resources was noted by many of the early visitors. For example, Stafford (1977, p. 9) reported an assistant to Reverend Chapman made the following comment about the thermal pools in 1835: “I have no doubt their medicinal qualities are great, and perhaps bye-and-bye this place will become the Cheltenham of New Zealand”. In 1849 Governor Grey, who, convinced of the thermal waters’ curative powers, became an advocate for the development of a spa (Steele, 1980). However, it was not until hotel developments commenced in the 1870s that significant numbers of visitors were attracted to the hot springs. By 1876 coaches were ferrying invalids to the town from Auckland, and all available hot springs were in use (Stafford, 1986). During this period there were no purpose-built baths for the tourist-invalid, as depicted in Figure 3.2: “They either used the natural pools, or scooped out holes for themselves at the edge of the lake” (Reggett, 1972, p. 54).

**Figure 3.2 Hot Pool Bathing in the late 1800s**



BATHING IN HOT POOLS.

Source: [www.rotoruamuseum.co.nz](http://www.rotoruamuseum.co.nz)

There is evidence that a strong parochial attitude was developing in the local tourism industry. Stafford (1986) for example noted reports that locals were openly envious of the publicity that Waiwera Hot Springs, north of Auckland, was

attracting. Indeed, it has been suggested that Waiwera opened New Zealand's first thermal tourist resort in 1845 (Coventry, 2001a). However, Rotorua was soon to benefit from the resources of central government. The government planned to develop Rotorua as "a hot water mineral spa on much the same lines as the famous European and English spas such as Vichy, Carlsbad, Bath and Harrogate" (Savage, 1980, p. 5).

Not surprisingly, entrepreneurs were attracted to Rotorua's rising popularity. One of the best known was a Canadian, Stephen Brent, who opened the ten-room Bathgate Hotel in 1880 (Stafford, 1986). By 1963 Brent's Hotel had grown to become New Zealand's largest with 227 rooms (Rotorua Public Relations Office, 1963). Interestingly, at that size it would remain the largest in Rotorua today. The site proved an astute choice, as it was adjacent the main area that would be developed into spa facilities by the government. In 1882 the government commissioned the first of a number of bathhouses, on land gifted by Ngati Whakaue (Stafford, 1986). This area would become known as the Government Gardens. Balneologist Dr Hope-Lewis was appointed to open the Pavilion Bath, the first government bathhouse, on the site of the current Polynesian Spa (Stafford, 2000). The Pavilion Bath opened in 1885 (Rotorua Public Relations Office, 1963). Rotorua's first guidebook was printed in the same year (Stafford, 1977).

A new era for tourism in Rotorua began in 1894 with the arrival of the railway (Steele, 1980). This became an important early link to the domestic market, and international gateway, of Auckland. By the 1920s, travelling time by train had been reduced to seven hours from Auckland (Tapsell, 1972), and 16 hours from Wellington (Herbert, 1921).

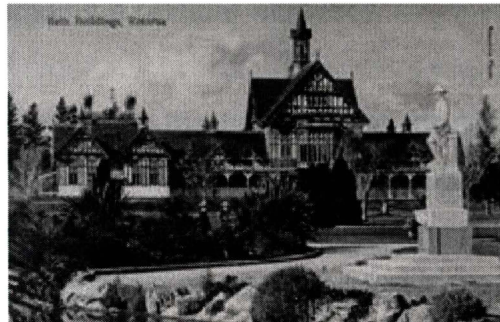
Brown's (1985) analysis of the evolution of 19<sup>th</sup> century British resort development, confirmed that the medical profession was responsible for some of the initial resort development impetus in that country. In New Zealand it was English Balneologist, Dr Wohlmann, who in 1902, following a tour of European spas, convinced the New Zealand government of the value of the sanatorium concept (Stafford, 1988).

The then New Zealand Minister of Finance is credited with picking up Wohlmann's spa vision:

*The history of the establishment and development of mineral hot water spas in New Zealand is a tribute to the vision and statesmanship of one man - Sir Joseph Ward, Minister of Finance in the Liberal Ministry in 1902 and Prime Minister of New Zealand in 1906. (Rotorua Public Relations Office, 1963, p. 44).*

The spa flagship was the Main Bath Building, shown in Figure 3.3, which opened in 1908: "In this building one may receive exactly the same treatments as, say, Buxton or Harrogate" (Herbert, 1921, p. 62). This landmark building, later popularly referred to as the Tudor Towers, is the last remaining example of the early spa facilities. Arguably one of the most photographed buildings in New Zealand, the Bath House currently houses Rotorua's art and history museum.

**Figure 3.3 The Bathhouse**



**Source:** [www.rotoruumuseum.co.nz](http://www.rotoruumuseum.co.nz)

The establishment of the NZ Department of Tourist and Health Resorts in 1901 was the first of its kind in the world (Steele, 1980). Rotorua's starring role in the department's formative years was acknowledged when Tourism New Zealand chose to celebrate its centennial in the city. New Zealand was also the first country to establish government operated visitor information offices, in 1911, with the Government Tourist Bureaux (Coventry, 2001b). Both would become important in the promotion of Rotorua during the 20<sup>th</sup> century. A 1903 full page advertisement of New Zealand by the Department in the British magazine, *The King and His Navy and Army*, urged travellers to visit Rotorua for "its great variety of natural Hot Mineral Waters that cure Rheumatism, Sciatica, Gout, Obesity,

Liver Complaints, Uterine Troubles, Nervous Disorders, Skin Diseases, and other kindred ailments” (anon, 1903, p. viii). One of the key straplines in the advertisement referred to New Zealand as the ‘Sanatorium of the Earth!’

The new century also saw Waimangu Geyser emerge as the world’s biggest. This became Rotorua’s next major claim to world fame, until it ceased in 1904. Reggett (1972) noted that it was a happy coincidence for the geyser to emerge at the same time the Department of Tourist and Health Resorts was being established. The influence of the geyser must have been significant as visitors to Rotorua doubled from 5,606 in 1900/01 to 12,122 in 1901/02.

Since some Rotorua visitors stayed for weeks or months, the Tourist Department saw the need for additional amusements (Reggett, 1972). Among the new initiatives was the Waimangu Round Trip, developed by the first government appointed guide, Alf Warbrick. The tour, which focused on the areas affected most by the 1886 eruption, remains a popular attraction.

In 1915 Rotorua was selected as the hospital site for convalescent and wounded World War One soldiers (Stafford, 1988). The war did not affect Rotorua tourism as much as other New Zealand destinations, since friends and relatives of convalescing soldiers came to visit them (Reggett, 1972). Wohlmann changed his surname to Herbert in 1916 to hide the connotation of German origins during the war (Stafford, 1988). The sanatorium started to decline in popularity following the departure of Herbert in 1919 (Rotorua Public Relations Office, 1963), although the balneologist remained pro-active from afar. Herbert’s (1921) book, *The Hot Springs of New Zealand*, sought to convince the British medical profession of the therapeutic value of New Zealand’s mineral waters. Herbert (p. vii) on his role in the establishment of the spa in Rotorua:

*For such shortcomings as the New Zealand spas may possess...the author must bear, at any rate in part, the blame. He was appointed in 1902 as Government Balneologist to advise in the development of the health resorts of New Zealand. Such a unique appointment carries with it corresponding responsibilities, and the author is keenly aware of his deficiencies. The wealth of material was so*

*great, the choice so large, that it was a matter of extreme difficulty to choose a policy. Rightly or wrongly, the line he advised was to develop one spa, Rotorua, thoroughly, rather than attempt, with limited means, to develop half a hundred; and so the visitor may rest assured that at Rotorua, at any rate, he will find the balneological amenities to which he is accustomed nearer home.*

A temporary revitalisation of the spa concept occurred in 1928 when Sir Joseph Ward again became Prime Minister (Rotorua Public Relations Office, 1963). Unfortunately Sir Joseph died a short time later, and the attempt to make Rotorua the great spa of the southern hemisphere floundered further, due to the depression years of the 1930s and then World War Two (Rockel, 1980a). Indeed, during the war there were almost no holiday visitors to New Zealand (Staniford and Cheyne, 1994). The government had dispensed with the Rotorua sanatorium concept by the 1950s (Stafford, 1988). Half a century later, Rotorua District Council (1992) attributed failure to a number of factors, including: long distances from markets, and lengthy travel times, slow internal travel options within New Zealand, high plant maintenance costs in the acidic environment, too few people using the facilities, and a relatively strong medical (Sanatorium) focus that fell from vogue in the 1920s as modern medicinal practices expanded.

However, the spa vision never completely disappeared in the minds of many locals: "With its hot mineral springs of proven medicinal value, Rotorua may soon regain the place it had at the turn of the century as one of the most famous spas in the world" (Daily Post City Celebration Issue 25/1/63, p. 56). Such comments may have been based on the success of the Ward Baths and Blue Baths in the Government Gardens. From 1950 to 1962 the two complexes attracted over three million bathers. In 1962 the Ward Baths and Blue Baths attracted 188,106 and 128,366 bathers respectively (Rotorua Public Relations Office, 1963), figures many New Zealand tourism businesses would be proud of today. In 1961 control of the Bathhouse was transferred to the Rotorua Borough Council (Stafford, 1986), and was last used as a sanatorium in 1965 (Rockel, 1980a). The public and private sectors would not seriously demonstrate an eagerness to commit to the spa vision again until the end of the 20<sup>th</sup> century. Initiatives in 1999 rekindled public interest in the concept:

- RDC economic development manager Ross Stanway announced plans to re-investigate the potential of spa development (NZ Herald, 12/4/99).
- A joint venture between private interests and RDC announced plans redevelop the Blue Baths as a bathing facility (NZ Herald, 18/12/98).
- Waiariki Institute of Technology's Bachelor of Tourism Management programme announced plans for a 'Healing Waters' conference for spa tourism academics and practitioners to be held in June 2000.

By the time of the Healing Waters conference a number of new spa proposals had been announced:

- Local Maori-tourism entrepreneurs Mike and Doug Tamaki announced plans for a \$2.2 million redevelopment of the Orchid Gardens, located in the Government Gardens, into a Maori themed spa centre.
- Sport'n'Spa Resort announced plans for the development of an exclusive spa resort at Tikitere, adjacent to Hells Gate.
- Hells Gate thermal reserve announced plans to develop a spa based local on Maori bathing traditions.
- Queen Elizabeth Hospital announced feasibility plans for a health spa development to supplement its rehabilitation, rheumatology and orthopaedic centre.
- The redeveloped Blue Baths were opened.
- Redevelopment plans for Waikite Hot Pools were announced.

At the end of 2000, RDC received confirmation that it would be one of the first recipients of the New Zealand government's new regional economic development fund. Mayor Graham Hall confirmed this would progress a strategic plan for spa development (Rotorua Chamber of Commerce, 2000). This coincided with the news that Rotorua would host the Asia-Pacific International Spa Association (ISPA) conference in June, 2002 (New Zealand Herald, 7/2/01). During the period of the thesis, the on again, off again nature of Rotorua's spa dream appeared to be gathering renewed momentum. In early 2001, Tourism Rotorua had

announced it was considering changing its positioning in international markets to 'Nature's spa of the South Pacific' (Coventry, 2001b). However, Mike Tamaki publicly criticised the Rotorua District Council's bureaucratic and conservative attitude towards tourism development projects (The Daily Post 8/2/01, Coventry 2001c). Tamaki's comments, echoed by Chamber of Commerce president Mike McVicker, focused on red tape surrounding his company's proposed spa.

## **Rotorua's Reliance on Central Government**

No other town in New Zealand has a more complex legislative history than Rotorua (Rockel, 1980b). Rockel noted that although a town board was formed in 1880, and operated until 1901, it was very much a caretaker body, "dealing with the collection of license fees from hotels and the problems of their cesspools, and the like, and that any important decisions were made by Mr Rolleston, Minister of Lands, in Wellington" (p. 55). Residents did not have to pay rates from 1881 to 1906, due to all Rotorua lands being leasehold for 99 years, from 1880. There was simply no rateable land (Rockel, 1980b). The only sources of revenue were from crown rents, bath fees and some charges for water and night soil collection (Rotorua Public Relations Office, 1963). Central government therefore funded almost everything. "No other town in the country enjoyed such support from public funds" (Stafford, 1986, p. 36). Indeed it was claimed Rotorua was the only town in the British Empire to have been completely controlled by central government (Braynart, 1980). Stafford reported that under the Rotorua Town Bill of 1907, the town was to be managed by the tourist department. The government administration continued until the passing of the Rotorua Borough Act in 1922. The Rotorua Borough Council was established in April 1923 (Rotorua Public Relations Office, 1963), on, perhaps ironically, April Fool's Day. However, Rotorua did not have an independent council, devoid of government representatives, until 1950 (Stafford 1988, Tapsell 1972).

Over the past century, the government assumed wide-ranging responsibilities in Rotorua, including: airports, drainage, water supply, roads, parks and gardens, railways, THC International Hotel, spa development, electricity, visitor information, lake launches, and thermal attractions such as Whakarewarewa and Waimangu

Valley. The Tourist Department was even involved in releasing deer and possums (Stafford, 1988). Other examples of government involvement included (Stafford 1988, except where indicated):

- 1903 - New Zealand's first Government Tourist Office was built in Rotorua, on the southern end of the current Tourism Rotorua Centre site. The office was funded and operated by the Tourist Department until 1990.
- 1908 - the Tourist Department was given the power to administer the Maori villages, including Whakarewarewa and Ohinemutu.
- 1908 - Whakarewarewa Thermal Area was officially opened by the Tourist Department as a tourist attraction (Rotorua Public Relations Office, 1963).
- 1909 – the Tourist Department issued the first licences to guide tourists.
- 1910 - the Tourist Department opened a mock Maori village at Whakarewarewa (Steele, 1980).
- 1931 - the Tourist Department opened the Ward Baths, which were eventually sold to private interests in 1972 and renamed Polynesian Pools.
- 1932 - the Tourist Department opened the Blue Baths, which were consequently closed by RDC in 1982, and then reopened in 1999.
- 1947 - water supply and sewerage operations were transferred to council.
- 1960 - Rex Forester was granted New Zealand's first licence to operate as fishing and hunting guide, and in 1965 was employed full time by the Tourist Department as Hunting and Fishing Advisory Officer, based at the Government Tourist Bureau in Rotorua.
- 1963 - the Rotorua Maori Arts and Crafts Institute Act was passed, which was later amended to the New Zealand Maori Arts and Crafts Act in 1967.
- 1981 - the Department leased Waimangu Valley to private interests.
- 1984 - control of the Government Gardens was transferred to RDC.

Local residents appear to have had high expectations of the government's responsibilities in Rotorua. Stafford (1988) recorded a number of public requests for government support, including: a request for the department to manage the town band in 1909, a public meeting held to urge the government to improve

roads, fishing, gardens, water, and drainage in 1912, a Chamber of Commerce meeting proposed the government establish a fund of £500 for amusements and advertising in 1919, and a request for the Tourist Department to develop the run down areas of Whakarewarewa and Ohinemutu in 1926. A recurring theme has been the need for better overseas promotion of the district by government (Steele, 1980). Steel cited a 1930s example of the Rotorua Morning Post flaying the Government for inefficiency and lack of innovation in this regard: "Rotorua citizens will not readily forget the gross neglect that this resort suffered under the previous minister" (p. 25).

## **Rotorua's 'RTO' Promotions**

When Rotorua became the fourth town in New Zealand to obtain electricity in 1901, advertising was used to promote the new source of power as an attraction for visitors (Stafford, 1988). Stafford noted that the following year a committee had been formed to plan a carnival to attract more visitors. By 1908 the carnival programme and tourist guide had expanded to 100 pages.

In 1923 a rating levy was introduced for the sole purpose of promoting Rotorua as a spa (Stafford, 1988). During the 1920s Council's Publicity and Amusement Committee initiated several nationwide campaigns, hiring a number of advertising agencies (Steele, 1980). Tapsell (1972) noted publicity during the 1920s promoting Rotorua as the 'Thermal Wonderland of New Zealand'. In 1927 Council asked the public to assist with tourism, and split its Publicity and Amusement committee into three sub-committees: advertising, amusements, and Marine Parade (Stafford, 1988). Steele (1980) reported a major drive between 1925-30 took place to attract Aucklanders on weekend excursions, although the results were not startling.

## Rotorua Advancement League

In 1932 the Rotorua Rotary club moved to bring local organisations together “to effect unity of purpose in the promotion of the town’s assets” (Stafford, 1988, p. 201). This resulted in the formation of the Rotorua Advancement League, with community delegates appointed to work with the Council. Council accordingly changed its committee name to the Rotorua Advancement Committee. Steele (1980) reported that in the same year Council joined forces with the Railways and Tourist departments for a nationwide campaign to promote a ‘Health Holiday’ in Rotorua. The joint venture produced 5000 posters, a booklet promoting the spa aspect, and newspaper advertising (Stafford, 1988). The advertising copy read:

*Why suffer from rheumatism and its various allied troubles when you can find easy relief in Rotorua? Nature’s medicinal waters work like magic....Even if you are not a sufferer but only jaded, ‘nervy’ or ‘run down’ Rotorua will refresh you and restore you to robustness. Take the train to Cureland (Steele, 1980, p. 23).*

During the 1930s depression, Council showed greater attention towards tourism, with the publicity committee seeing particular value in attracting conferences (Stafford, 1988). Reggett (1972) noted that a series of high profile conferences were held in Rotorua in this period. The arrival of cruise liners during the late 1930s presented Rotorua with its first experience of hosting large groups of visitors (Reggett, 1972). During 1933 a ‘Winter Advertising Scheme’ was initiated to counter the cyclical nature of the tourist season (Steele, 1980). Steel suggested that in this and most of the promotions of the era, Council was in the thick of the action. Carnivals remained the focus of attracting visitors during the 1930s (Stafford, 1988). In 1936 Council proposed a junior employee be trained to organise carnivals and promotions. The position of ‘Borough Organiser’ was a forerunner to the latter day ‘Public Relations Officer’ (Steele, 1980). During the 1950s the carnival was upgraded, and local accountant Dick Spurdle was appointed as part-time ‘Organiser’. This became a full-time appointment in 1954 due to Spurdle’s achievements. “Organisers had been employed in the past but none quite like the man chosen in August 1950...it is unlikely that anyone before

or since has been involved (behind the scenes) with as many Rotorua events” (Stafford, 1988, p. 274). When asked where he got promotional ideas from, Spurdle advised:

*I study overseas material, but there are few places with the same set-up as here. Its amazing how many people come up with really first class ideas. They tell, we consider the suggestions, and quite often we act (Daily Post City Celebration Issue 25/1/63, p. 46).*

## **Rotorua Tourist League**

Also in 1954, the Rotorua Tourist League (RTL) was formed. The organisation played an active role until 1959, when it reformed as a branch of the New Zealand Travel and Holidays Association (Stafford, 1988). In 1953 the new national association had agreed to form provincial committees, which in turn would become independent RTOs in 1985 (Staniford and Cheyne, 1994). Interestingly, the formation of the NZ Travel and Holidays Association came 51 years after the establishment of a Government tourist department. The RTL sought £20 from 200 local businesses for promotion (Stafford, 1988). The Daily Post (1/12/59 - Stafford Collection) reported on another plan by the Association to seek £40 from 200 businesses. This type of funding approach would also be attempted twice during the 1990s, to raise funds for event promotion. A 1950s brochure produced by the RTL promoted Rotorua as the ‘Wonderland of New Zealand - Come to Rotorua for a perfect vacation’. Interestingly, no contact details were provided in the brochure.

## **The P.R.O.**

In 1955 Rotorua’s first Public Relations Office (PRO) was established, ironically as a branch of the Auckland PRO. The office was managed by an Auckland appointed officer and a local promotions committee, on land provided by the Tourist Department (Stafford, 1988). The following year, the Auckland PRO suggested that Rotorua take over the office due to significant financial losses. A grant from the Tourist Department, sponsorship from Council and community contributions enabled the office to continue. Mrs Phyllis Bartlett became the first locally appointed Public Relations Officer.

The Rotorua Borough Council took over control of the PRO in 1958 (Rotorua Public relations Office, 1963) and Dick Spurdle was appointed as Public Relations Officer (Stafford, 1988). The office was as much a service for locals as well as for visitors. For example, the PRO maintained a contact list of local baby sitters, and produced the annual 'Who's Who' business and community guide (Rotorua Public Relations Office, 1963, p. 99) Other PRO responsibilities included: the annual Christmas/New Year carnival organisation and sponsorship, street pennants, festoon lighting, Sunday night Maori concerts, Saturday night dance, annual Rose Festival, conference support, assistance to council for royal visits, civic receptions, mayoral welcomes, press releases, and a newsletter to Rotorua expatriates overseas.

The summer carnival, initiated at the turn of the century, remained a focus for PRO advertising. For example, celebrating New Year's Eve in Rotorua was promoted as 'a national tradition' (Rotorua Public Relations Office, 1963). The PRO relocated to Haupapa Street, almost adjacent the GTB, in 1960, and was credited with the remarkable growth of interest in Rotorua (Stafford, 1988). One of the PRO's major initiatives was planning the distribution of 25,180 pamphlets in 543 packets to 116 countries in 1962 (Daily Post 31/10/61 - Stafford Collection). The brochure promoted Rotorua as 'The Playground of New Zealand'. Also in 1962, Rotorua reached city status. The event was deemed historic enough for a national television crew to be present at the Council meeting that passed the resolution (Stafford, 1988). In 1963 the PRO produced the magazine style publication *Your future's in Rotorua* as part of the commemoration. The page used to promote Rotorua as a holiday destination featured the following promotional statements:

- Fascinating Rotorua
- Rotorua, for the Holiday of your Life
- New Zealand's Lovely Lakeland
- The Curative Spa of the South Pacific
- The Playground of New Zealand

Another theme used in the brochure was 'The Fascinating Rotorua Radius' to highlight the range of attractions available within a short drive. These included Wairakei, deep-sea fishing and Waitomo Caves. The 1963 PRO brochure *Haere Mai Rotorua* was a full colour magazine, which attempted to cater for visitors in Rotorua, as well as to prospective out of town enquiries. Four major promotional statements were used in the brochure:

- Rotorua has Everything
- New Zealand's Lovely Lakeland
- South Pacific, all year Holiday Centre
- Thermal Wonderland

The same year also saw Rotorua's first sister city relationship established, the retirement of Spurdle, and the appointment of Ernie Leonard as PRO (Stafford, 1988). In a *Daily Post* feature article (13/5/64) Spurdle, then retired, criticised the Government's 'penny-pinching' tourism policy following a visit to Australia. Spurdle claimed the Tourist Department was the Cinderella of New Zealand's government departments. Also discussed were the 60,000 copies of *Fascinating Rotorua*, in which costs were shared between the PRO and the Tourist Department. Spurdle claimed none were seen on display at the 15,000 square foot New Zealand pavilion at the Sydney Royal Easter Show.

By 1964 the PRO was using the strapline 'Rotorua - New Zealand's Thermal Wonderland'. During the same year, the Rotorua branch of the New Zealand Travel and Holiday Association decided to form a Bay of Plenty (BOP) promotion board (Daily Post 28/5/64 - Stafford Collection). In 1966 a committee was elected to promote off-season events and plan a BOP regional venture (Daily Post 19/8/66 - Stafford Collection). The following year a meeting in Taupo was held to form a regional committee of the Association (Daily Post 24/7/67 - Stafford Collection). From 1965 to 1967 the Bay of Plenty, Rotorua and Taupo regional committee designed the 'Tourist Diamond' theme to promote the region (Daily Post, 6/7/68 - Stafford Collection). In 1968 a large group travelled as far south as Invergargill on

a promotional tour, with the main sales aid being a brochure entitled *The Diamond Digest* (Stafford, 1988).

Stafford (1988) noted the PRO, as well as playing a central co-ordinating role in the Tourist Diamond regional concept, was also responsible for the development of the Sportsdrome building and Rotorua International Trout Fishing tournament. The motivation for developing the fishing tournament is best summed up in the words of the late local fishing identity and author Rex Forester: "In the sixties it was so quiet in November that you could fire a shotgun down Fenton Street and not hit anyone!" (Personal communication, circa 1990). In 1970 John Minty became PRO, following Ernie Leonard's departure to NZBC television.

## **Rotorua Promotion Society**

In 1973 a public meeting was convened by Agrodome co-founder George Harford, to discuss the formation of a Rotorua Development Association. This, Harford proposed, would not be in competition with the local branch of New Zealand Travel and Holiday Association (Daily Post, 21/6/73 - Stafford Collection). Within a month Harford launched the Rotorua Promotion Society (RPS), with the idea of promoting Rotorua as 'The Hottest Centre in NZ' (Daily Post, 18/7/73 - Stafford Collection). No details of any activities undertaken by the organisation were sourced.

In a 16 page National Travel Association newspaper supplement distributed in 1975, Rotorua featured in a small destination advertisement, in comparison to competing regions (National Travel Association, 1975). The theme used in the advertisement was 'Rotorua, for the holiday of your life'.

Following the sudden death of John Minty in 1980, Bob Low, who had previously operated a private tourist booking office, was appointed Public Relations Officer. Little activity of the PRO and RPS at this time is recorded. Indeed the two organisations may have become relatively inactive, since Stafford (1988) reported that in 1981 a new RPS formed, and undertook "far reaching promotions" around

New Zealand and Australia (Stafford, 1988, p. 372). By 1983 the RPS was becoming more active, with a number of initiatives including a four-member delegation visited travel agents in Sydney, Melbourne and Brisbane (Daily Post, 25/3/83 - Stafford Collection). Also, a proposal to RDC to take over the PRO, which was contested by two Maori trusts: "The PRO was seen as a powerful player in controlling tourism bookings" (Ben Hona, former Tumunui Trust chairman, personal communication, 1999). The RPS bid was successful. Council closed the PRO and agreed to provide a grant of \$65,000, to the RPS, per annum for three years. In what was a remarkable deal, RDC and RPS persuaded the Government Tourist Bureau (GTB) to extend its five and a half day a week operation to seven days, in return for annual funding of only \$4000 (Stafford, 1988). Public debate over the closure of the PRO was still raging in the Daily Post fourteen months later (see Daily Post, 19/1/84 - Stafford Collection).

## **Image Rotorua**

In 1984 a public meeting was called to seek support for the creation of Image Rotorua. This was to be formed as a sub-committee of Rotorua Job Search, which was an initiative of the local Rotary clubs. The concept was to seek a co-ordinated approach to promoting the city, due to a fear that Rotorua was lagging behind other centres (Daily Post, 13/3/84 - Stafford Collection). The RPS allocated \$11,000 to Image Rotorua (Daily Post, 8/6/84 - Stafford Collection). This plus other grants made to sports clubs, was interesting in light of the RPS' own limited funding. For instance, membership subscriptions for the first year only reached \$30,000 (Daily Post, 18/2/84 - Stafford Collection). However, it is unclear what resulted from the Image Rotorua proposal, particularly since the press reported constant bickering between RPS, Rotorua Business Association, Chamber of Commerce and RDC (Rotorua Review 20/6/86).

The co-ordinated approach sought by Image Rotorua was not surprising given the range of other organisations with an interest in promoting Rotorua at the time. These included: the RPS, the Business Association, Retailer's Association, Chamber of Commerce and the local branch of the Travel and Holidays

Association, which used the theme 'Sparkling Rotorua' (Daily Post, 14/7/84 - Stafford Collection). In 1985 the RPS merged with the local National Travel Association branch (Stafford, 1988) and sent a delegation to visit Australian agents (Daily Post 20/9/85 - Stafford Collection). The RPS adopted the 'Sparkling Rotorua' strapline, which may have been an attempt to reverse the growing negative destination image and tired CBD visage. The RPS also moved to obscure premises in Hinemoa Street (Stafford, 1988). While the merger was expected to provide many advantages in the promotion of Rotorua, local residents saw the move as the end of PRO services.

During 1986 the RPS, in association with Tauranga and Whakatane, applied for a NZTD grant of \$5,000, as part of the Regional Tourism Action Campaign (RTAC), to produce a regional marketing plan for the Bay of Plenty. The stimulus for the co-operative approach was that the grants were only available to provincial regions, and not individual towns or cities. For more details of RTAC the reader is referred to NZTP (1990). Among the government's restructuring initiatives at this time was the legislation for regional councils to be responsible for the coordination, planning, marketing and strategic planning of tourism in the regions (Pearce, 1990). Also in 1986, after much debate, RDC agreed to increase the RPS grant to \$75,000 per year for a further three years. Some councillors believed Rotorua ratepayers were not getting value for money from the RPS (Daily Post 21/5/86 - Stafford Collection). In return for the increased funding, RDC imposed the following responsibilities, which were regarded by members as being considerable, on the RPS:

- Destination promotions in New Zealand and overseas.
- Organisation of an annual Christmas carnival.
- Provision of a seven-day a week accommodation booking service.
- Provision of a show ticketing service.
- Promotion of Rotorua as a conference centre.
- Servicing of general visitor enquiries.

The total RPS spend during 1986 was approximately \$250,000 (Daily Post 23/5/86 - Stafford Collection). This enabled new initiatives such as a sales mission to Los Angeles (Daily Post 18/8/86), and the commission of Auckland firm, PA Consultants, to develop marketing strategy options (PA Hotels and Tourism, 1987). PA Consultants held 30 interviews with business managers and councillors in Rotorua, and 14 interviews with inbound tour operators in Auckland. The findings presented a powerful situation analysis:

- Maori and geothermal were the undeniable strengths of Rotorua, and more should be made of their significance in the promotion of Rotorua.
- Some Rotorua respondents felt that the strong promotion of the few high profile attractions had overshadowed the range of alternative activities.
- Rotorua did not communicate itself well.
- Local and national media were biased in their negative publicity, using sensationalism rather than facts.
- Rotorua had turned its back on the lake.
- Rotorua was developing into a town that was not particularly attractive.
- Rotorua was stagnant, even going backwards, and living on its reputation.
- The Mayor and councillors were not seen to be supporting tourism.
- A local view that Auckland tour operators didn't seem to get the message about Rotorua. However, one such tour Auckland operator stated that he had never met anyone from 'Whaka'.
- A general agreement that the key reasons for failure were poor destination marketing and the poor state of Whakarewarewa Village.
- The visitor base was eroded by other communities putting in more effort.
- Rotorua's image was tarnished, soulless, and had no character.
- Rotorua needed professional help.

## Tourism Rotorua

The 1980s were also a challenging decade for the New Zealand tourism industry in general, due to changing travel patterns. For example, from 1983 to 1988 domestic person nights decreased from 61.4 million to 53.1 million (NZTP, 1989/2), while international visitor arrivals doubled during the 1980s (Pearce 1990). Changes in international arrivals led to a greater diversification of the market. Prior to this, tourism in New Zealand had mostly focused on “passive sightseeing of a range of natural scenic resources” (Cushman, 1990, p. 13). Pearce claimed that at the time overseas marketing by the regions had been limited to “modest campaigns on the East Coast of Australia” (Pearce, 1990, p. 40).

The year 1988 proved to be a watershed in the evolution of destination promotion by Rotorua. The RPS board resigned en mass and abdicated its RDC agreement. A former RPS board member summed it up in this quote, which was reported by Horn, Fairweather and Simmons (2000, p. 35):

*...the Promotion Society just grew and grew and I think in the finish it had about 20 board members and you went to a meeting to discuss the previous minutes of the previous minutes of the previous minutes and really got nowhere – too big, too cumbersome and no-one could get any direction. Badly led.*

A members' meeting later revived the RPS, without RDC funding, to focus on domestic promotions. RDC wasted no time in finding another use for the RPS grant. An RDC tourism subcommittee meeting in May 1988 (Rotorua District Council, 1988a) reported Ted Bates (NZ) Ltd had been approached to design a promotional strategy. Mr R. Jacobson from the advertising agency discussed concern over New Zealanders' blasé attitude towards Rotorua, suggesting they probably considered Rotorua to only feature geothermal and Maori attractions. Rotorua's image problems must have appeared obvious as the agency's promotional recommendations were based on discussions with colleagues and

friends rather than any formal market research. The committee agreed to two objectives:

1. Short term publicity to increase low season visitors.
2. Long term promotions to reactivate interest in Rotorua as a holiday destination for New Zealanders, by changing perceptions and attitudes towards Rotorua.

At a special meeting of the committee, also in May, Ted Bates (NZ) Ltd introduced the new theme 'Rotorua...Full of Surprises', which would "remain constant no matter how the target audience changes" (RDC, 1988a, p. 022963). The target market was described as, "younger, more active, relatively well off and mobile people from Auckland/upper North Island who have flexibility to take holidays as they see fit" (RDC, 1988a, p. 022963). The one-month campaign would commence in June, using Auckland radio, Sunday Star and Sunday News. The proposed budget was \$43,425.20, which was accepted by the committee. RDC District Manager Ted Hansen advised that this budget came from the money not spent with the RPS due to their resignation (Personal communication, February 1999). The campaign was presented to the Rotorua tourism industry on May 23<sup>rd</sup>, 1988. It should be noted that no members of the industry were involved with the RDC tourism subcommittee in planning the original campaign. Unfortunately RDC has since disposed of all material relating to the campaign, including the advertising brief and promotional recommendations for the brand.

Following the campaign, RDC sought comment from the public. A total of 39 submissions were received, with the majority recommending that RDC needed to take control of tourism promotion and coordination. As noted by Hall (1999), the need for coordination is felt most when there is a lack of it. Council agreed to the establishment of a Promotion and Marketing Co-ordinator position, which was advertised in September 1988. The author was appointed to the position in January 1989, with a budget of \$250,000 that would become available in April. The sole position gradually evolved into a team working under the umbrella of 'Tourism Rotorua', remaining responsible to RDC. RDC's mission statement for the RTO was, and remains: *To enhance the economic base of Rotorua by the*

*vigorous marketing of the district as a tourism destination* ([www.rotoruanz.com](http://www.rotoruanz.com)). Meanwhile, the closure of the NZTP's domestic travel offices, formally Government Tourist Bureaux, was announced in June 1990 (Pearce, 1990). The move ultimately forced Rotorua to become more proactive in visitor information services provision.

In January 1996, after seven years with Tourism Rotorua, the author resigned from. By this time the organisation comprised a marketing office with six staff and a budget of \$1 million, a visitor centre with 11 staff and turnover in excess of \$3 million, and the redeveloped Rotorua Convention Centre with five staff. Later in 1996, Tourism Rotorua released the district's first strategic plan for tourism, which identified eleven strategic directions. These are summarised in Table 3.2.

**Table 3.2 Tourism Rotorua's Strategic Directions**

1	Developing the Rotorua brand identity
2	Product development
3	Marketing
4	Environmental tourism
5	Seasonal trade issues/events
6	Maori tourism
7	Market knowledge
8	Training, education, upskilling
9	Public infrastructure
10	Transportation
11	Financial/funding issues

**Source: Tourism Rotorua (1996)**

A series of 'Portfolio Groups' was initiated to progress the strategic directions, including domestic marketing. Elections were held to appoint industry representatives to each portfolio group. During 1997 Tourism Rotorua launched the new brand 'Feel the Spirit Manaakitanga', depicted in Figure 3.4, to replace 'Full of Surprises' in all markets. Domestic television advertising ceased in 1996 to help pay for the estimated \$100,000+ brand development cost (Tourism Rotorua Marketing Manager, Personal Communication, circa 2000). Until 2000, promotion in the Auckland region consisted primarily of the quarterly distribution of event information to households in selected suburbs, public relations and some print advertising. A small television advertising campaign was initiated in 2000. Also in

the same year a domestic marketing manager position was created to coordinate the domestic portfolio group.

Figure 3.4 The Rotorua Brand



Source: [www.rotoruanz.com](http://www.rotoruanz.com)

## Negative Publicity

Not all publicity about Rotorua has been kind. This has perhaps best been evidenced by a century of comments about the region's sulphurous aroma. Other negativity has surfaced concerning commercialism of the tourism product, lake pollution, a tired CBD and crime against visitors.

### Rotten Egg Town

In what continues to be a topic of conversation for today's visitors, during the 1880s neighbouring villages referred to Rotorua as 'Rotten Egg Town' (Stafford, 1986) and 'Stinkville' (Stafford, 1977). Stafford (1977) also noted the comments of an early visiting journalist: "Judging from the strong smell of sulphur, the lowness, dampness, and unhealthiness of this place, I had no reason to ask why the people of Ohinemutu call it 'Rotten Egg Town'" (p. 20). Steele (1980) reported a number of unfavourable comments by visiting journalists during the 1920s and 1930s, including *Punch* writer Sir A. P. Herbert who loved New Zealand but could not understand why everyone was so proud of Rotorua since it smelt so distasteful. 'Rotten-rua' and 'Sulphur City' are other examples of nicknames to emerge that have been widely adopted.

## Too Touristy

Another recurring criticism has been the perceived over-commercialisation of Rotorua's tourism industry, which is certainly not a modern phenomenon: "As early as 1872 letters were reaching newspapers complaining of exorbitant charges made by Maori owners for their services" (Stafford 1986, p. 93). Savage (1986) suggested entrepreneurial assertiveness of the Tuhourangi people at Te Wairoa, developed from their control of the terraces, was the cause of such irritation. By 1885 the government had introduced a scale of charges for guiding tourists to the terraces (Reggett, 1972). Stafford (1986) noted reports of intensive rivalry between operators, which led to concern over touting, violence, rivalry and disorganisation. In this regard Warbrick (1934) gave an interesting account of his problems with the commercial envy of others, following the eruption, including several attempts to smash his boats. On one occasion while guiding tourists en route to Tarawera, Warbrick claimed to be accosted at gunpoint by three jealous Tuhourangi Maoris. Warbrick was forced to place a pistol in the ear of one of the assailants to end the skirmish.

Further criticism in the press during the 1880s condemned Rotorua as being a decadent place: "...others, less restrained, referred to it as a place of immorality and debauchery" (Stafford, 1986, p. 354). Part of the problem was the stark contrast between the stuffiness of Victorians, compared with the locals who performed animatedly and bathed naked (Reggett, 1972). A 21<sup>st</sup> century example, was the local debate surrounding the dramatic rise in fees to visit Mt Tarawera, after it was leased to a commercial operator for the first time (see Coventry, 2001d). The commercial aspect of Rotorua tourism perhaps also contributed to the 1990s' growth in use of the nickname 'Rotovegas'. This label had emerged from an 'Elvis in Geyserland' art exhibition at the Bathhouse. By 2001 Rotovegas had become the topic of a local newspaper editorial, where it was claimed district councillors disapproved of the bastardisation of the town name (Rotorua Review, 17/4/01).

## **Unflushed Toilet**

Rotorua has also suffered from negative media relating to aspects of untidiness. One particularly high profile incident occurred in 1965, when the president of the Travel Agents Association of New Zealand described Rotorua as the most squalid place in the country, and that all it had to offer was a mud pool (Steele, 1980). Council had of course not helped the cause with the development of the town's rubbish tip on the lake foreshore at Sulphur Bay, adjacent to the central business district, and the release of sewerage into Lake Rotorua after only partial treatment. Little wonder that a visiting overseas scientist gained national media coverage when he labelled the lake an unflushed toilet (Stafford, 1988). A survey of local residents found that 66 per cent agreed the level of lake pollution was bad, but that few were actively involved in doing anything to rectifying the situation (Litten, 1991).

## **'Petty' Crime**

In 1999 the subject of Rotorua's image was again to the fore in the local media. Dominating the limelight for a fortnight during the summer tourism season in *The Daily Post* was the issue of crime levels in the district. Crime has been a recurrent cause of image concerns. In 1985, for example, the police publicly complained in the local media that Rotorua was becoming a violent town (The Daily Post, 11/7/85). NZTB (1992, p. 9) linked the crime problem to Rotorua's tourism image: "Local unemployment and crime is creating an image problem for Rotorua". The report also considered local media a problem: "Rotorua has an image problem with the local press and has received unfair comments" (p. 21).

A senior sergeant started the 1999 furore by commenting that the police were sickened by the low life scum who continually dominated crime in Rotorua (Daily Post, 18/1/99). One example was the fact that 1400 cars had been broken into during the previous twelve months. Mayor Hall responded with claims that it was only 'petty crime' and that it shouldn't be discussed publicly due to the negative effect on Rotorua's tourism image. Hall suggested that bad publicity might dissuade visitors from coming. For two weeks letters to the editor were dominated by accusations of Mayor Hall having his head in the sand. One letter from a former

Daily Post editor suggested a district's image had as much to lose from cover-ups and secrecy as it did from the actual hoons. Another writer commented that Rotorua's 'Feel the Spirit' branding was taking on a far more ominous meaning, and claimed that businesses were noticing a drop in visitor trade due to the media publicity. Rotorua Safer Community Council (RSCC) co-ordinator Peter Waru confirmed Rotorua was over-represented in violence, sexual abuse, drugs, dishonesty, and burglaries, with figures far exceeding the national average (The Daily Post, 3/2/99). Mayor Hall responded that the RSCC was not doing its job effectively. The tourism industry remained remarkably quiet on the issue.

During the 1999 NZTB/Saatchi and Saatchi 'troubles', Mayor Hall had changed his viewpoint and commented that the NZTB inertia towards a Millennium promotional plan was less of a concern to Rotorua tourism than the local crime: "Locally we are more affected by the crime issue. Our domestic visitor numbers are down and that can be attributed to crime issues in the newspaper" (The Daily Post, 12/3/99). Mayor Hall also suggested that some tour companies were bypassing Rotorua due to the crime. *The Daily Post* cited figures showing Rotorua was second only to Auckland in burglary rates (Daily Post, 11/3/00). In particular, Fenton Street, which has the highest concentration of accommodation in Rotorua, had three times the number of burglaries than the Rotorua average. Motel break-ins represented 10 per cent of all Rotorua burglaries. In April, 2001, crime against visitors was again the local lead story, with concern from Mayor Hall: "I think we should do everything humanly possible to combat that trend of crime because tourism is hugely vital to our city and we must protect it" (The Daily Post, 18/4/01).

### **CBD Redevelopment**

In 1978, two hundred people attending a New Zealand Travel and Holidays Association branch meeting reached consensus that Rotorua was losing its 'oomph' in tourism against other centres (Stafford, 1988). One suggestion put forward was for retailers to open on Saturdays. Denial was strong in the mid-1980s among some civic leaders, perhaps best encapsulated in a quote by Mayor John Keaney: "It is in the interests of other centres to carry out a vendetta against Rotorua to put tourists off coming here" (Rotorua Daily Post, 13/8/86). Keaney

was commenting on reports in the *Dominion* under the heading 'Death of a Tourist town', and an associated television news item. By the time of the 1988 RPS resignation, Rotorua's image problems were compounded by a number of significant issues, including:

- The third highest unemployment in New Zealand, at 13 per cent (Stafford, 1988).
- National media coverage of protests by geothermal bore owners, over the closure of bores within a 1.5 kilometre radius of Pohutu Geyser. Hindley (1989) reported that scientists had come to regard geysers as an endangered species, since of 11 Whakarewarewa geysers that were active before 1950, only three were erupting frequently.
- Staff strikes at the NZ Maori Arts and Crafts Institute (Stafford, 1988).
- The national recession brought Rotorua commercial property development to a standstill (Stafford, 1988).
- High rent from out of town landlords forced retail closures, leading to an abundance of empty shops in the central business district.
- A tired cityscape due to RDC expenditure being directed towards sewerage infrastructure.

Interestingly, around this time Buckley and Witt (1985) presented preliminary results of a study of tourism in three 'difficult' areas in Britain and one in Germany. Three of their recommendations appear relevant to Rotorua. Firstly a concerted and targeted marketing campaign is required. Secondly, an investment in local authority resources is required to attract visitors, based on sound economic visitor monitoring. Thirdly, the support and cooperation of the private sector is critical to any local authority effort. Buckley and Witt suggested NTOs consider coordinating a conference to enable tourism development managers, who faced similar problems, to exchange information. With the benefit of hindsight, Rotorua's tourism leaders could have benefited immensely from such a conference at that time. Rotorua's negative image was so serious it had become a concern to

national tourism interests, and in 1992 NZTB undertook an analysis of the local tourism industry and infrastructure.

*The study is being carried out in the context of industry concern that Rotorua as one of New Zealand's major tourism hubs could be in decline and unless rejuvenated could lose its focus as a major tourism destination, either as part of the traditional touring circuit or as a regional tourism hub. Taupo has been suggested as a potential challenger to Rotorua's position as the central North Island main tourism hub (NZTB, 1992, p. 2).*

During the 1990s, as soon as a major sewerage system upgrade had been completed, RDC embarked on a much needed \$30 million redevelopment project that would change the face of Rotorua. Major works included beautification of the central shopping district and lakefront, and redevelopment of the Government Gardens, Bathhouse, Tourism Rotorua Centre and Rotorua Convention Centre.

## **Thesis Issues**

The chapter produced a summary of Rotorua's destination promotion evolution, in an attempt to identify factors that may have contributed to the development of the current image in the domestic market. Key issues for the thesis include:

1. Negative images
2. Local residents' attitudes toward visitors
3. The importance of domestic tourism to Rotorua
4. Tension between traditional tourism icons and diversity of new products
5. Consistency of destination promotion themes
6. A lack of formal market research to guide destination marketing planning, including little understanding of Rotorua's position as a domestic short break holiday destination.

## Negative Images

Rotorua has suffered from negative media attention, predominantly relating to crime, pollution, unemployment, geothermal bore closures and untidiness. Rotorua has also made headlines for tourist related accidents. For example, publicity surrounding two deaths of tourists in the year 2000, from possible exposure to Rotorua's natural elements, received national media attention on the same day (see Rotorua Daily Post, New Zealand Herald, TV1 news, 4/5/00). Firstly, a well-known retired Austrian actress died in a Rotorua motel unit from suspected hydrogen sulphide inhalation, the same fate that met an Australian honeymoon couple in 1987. Secondly, a domestic child visitor died through amoebic meningitis contracted by swimming in a natural hot pool. In early 2001, Rotorua again featured in the news through the white water rafting death of a Dutch tourist and hospital reports that an average of two people per week were seeking medical attention for luge related accidents (see Coventry, 2001d). In 2001, three accidents in one week involving overseas visitors participating in New Zealand tourism activities were reported. A five year old Chinese girl drowned at Rotorua's Polynesian spa, a 19 year old drowned while rafting in Queenstown, while on the same river 11 people were injured when a jet boat crashed (see Coventry, 2001e).

However, many of Rotorua's image problems have been the result of a lack of future planning by the tourism leaders. Indeed many of the problems experienced by Rotorua, which were presented in the chapter, were characteristic of the symptoms of a lack of planning suggested by Mill and Morrison (1986). Mill and Morrison suggested the origins of tourism destination planning had only began relatively recently, starting in Europe during the 1960s.

One of the key challenges for Rotorua's destination marketers during the past decade has been to reposition the district's tired image to one reflecting the diverse range of attractions that supplement the well-known geothermal and Maori attractions.

## **Local Residents' Attitudes Towards Tourism**

Rotorua residents have demonstrated a strong acceptance of tourism, and tourism promotion. The National Research Bureau (NRB, 1991) annual survey on ratepayer satisfaction of RDC services found 88 per cent of ratepayers supported an increase in visitor numbers. Also, 69 per cent supported RDC rates-based spending on tourism promotion. The 1994 survey (NRB, 1994), which featured different questions due to changing political needs, found that 63 per cent of ratepayers regarded tourism promotion as a 'very important' RDC service. The Ministry of Tourism (1992) also found that Rotorua residents were amongst the most positive in New Zealand in terms of tourism acceptance:

- 93 per cent rated tourism as very important to the local economy.
- 69 per cent believed the benefits were spread throughout the community.
- 75 per cent held a positive acceptance of visitors.

In an investigation of residents' attitudes in 10 New Zealand towns by Lawson, Williams, Young and Cossens (1998) found Rotorua, along with Auckland and Christchurch, to be moderately supportive of tourism. Residents were "neither so critical nor so enthusiastic" (p. 255). More recently Horn, Fairweather and Simmons (2000) concluded that, in general, Rotorua residents had a strong acceptance of tourism. The implication of these results for the thesis is it would be expected that Rotorua residents have a friendly attitude towards visitors.

## **Importance of Domestic Tourism**

Globally, domestic tourism markets have been an important source of visitors for most DMOs. For example Archer and Lawson (1982) cited a WTO (1981) report suggesting worldwide domestic tourism receipts were three to four times that of international tourism. In New Zealand, NZTP (1986/12) found during 1981/82, 59 per cent of hotel guests were domestic. For the same period, an estimated 83 per cent of motel business was domestic (NZTP (1986/8)). As discussed previously, a significant trend to emerge during the 1980s was the decline in domestic travel. In

1980 domestic tourism accounted for 67 per cent of all tourism revenue in New Zealand (Henshall, 1981). Table 3.3 summarises the changes in person nights (000's) on domestic trips during this period.

**Table 3.3 Domestic Person Nights in New Zealand: 1983/1988**

1983/84	1984/85	1985/86	1986/87	1987/88
61430	60334 (-1.8%)	59145 (-2%)	55105 (-6.8%)	53120 (-3.6%)

(Source: NZTP, 1989/2)

From 1989 to 1998, domestic trips continued to decline, by an average of 1.8 per cent per year. From 1981 to 1998 domestic trips declined from 14 million to 9 million, while nights declined from 57 million to 36.1 million (Goh and Fairgray, 1999). By 1995, domestic tourism spending was estimated at \$4.8 billion, which represented 53 per cent of New Zealand's total tourism receipts. Key socio-demographic trends to affect domestic travel have included: increases in car ownership, changes in employment conditions and increased international travel experiences (Goh and Fairgray, 1999). Another major factor in the fall of domestic travel has been the increasing attractiveness of overseas travel for New Zealanders. During the 1980s the domestic product was seen as inferior and more expensive (NZTP, 1988/27). It was estimated that from 1981 to 1998, the real cost of domestic travel declined by 1 per cent, while the real cost of international travel decreased by 49 per cent (Goh and Fairgray, 1999). Surprisingly, a 1 per cent increase in per capita income was predicted to result in 1 per cent decrease in domestic nights in two years:

*The rationale is that the effect of higher income changes may cause consumers to seek goods of higher perceived quality. In the case of domestic tourism, it can be argued that it is currently viewed as an inferior product to overseas travel (Goh and Fairgray, 1999, p. 13).*

For the period 1999-2005, Goh and Fairgray forecast domestic visitor nights to decrease from 36.1 million to 31.3 million, an average annual decline of 2 per cent. They forecast domestic trips to decline from 9 million to 8.2 million, an annual decline of 1.4 per cent. The key reasons were expected to be higher disposable income, the inferior image of the domestic product, and decreased real cost of international holidays.

Since most potential for growth in visitor arrivals lies offshore, domestic tourism can often be regarded as the poor cousin to the more lucrative overseas markets (Hall and Kearsley, 2001). However, the 1991 Gulf War, 1997 Asian economic crisis and the 2001 terrorist strikes, have demonstrated how quickly exogenous events overseas can change tourist flows in the short to medium term.

### ***The Auckland Market***

Since 1886, Auckland has been New Zealand's largest city (Auckland Regional Council, 1999). Auckland Regional Council projected Auckland to contain 40 per cent of the country's population by 2041, which is unprecedented in developed countries. Pike (1998) asked New Zealand RTOs to rank the importance of Auckland as a visitor market. Eight RTOs rated Auckland as their single most important market while five ranked Auckland second. Henshall (1981) estimated 89 per cent of Aucklanders holidayed within the North Island. Two decades later, Forsyte Research (2000) found that of those New Zealanders making trips of at least one night away, 70 per cent visit destinations in the North Island. Aucklanders averaged the highest spend per night (Forsyte Research, 2000). Table 3.4 provides a summary of domestic visitor flows to Rotorua from 1991 to 2001, year ending June. While the domestic proportion of total visitor nights declined, the Auckland proportion of total domestic visitor nights increased. Auckland is Rotorua's largest source of visitor nights. The closest overseas market to Auckland, in supplying visitor nights, is Australia. A comparison of visitor nights from the two most important markets is provided in Table 3.5.

**Table 3.4 Domestic Visitors to Rotorua – 1991/2001**

	<b>Total visitor nights</b>	<b>Domestic visitor nights</b>	<b>Domestic proportion of total visitor nights</b>	<b>Auckland proportion of total domestic nights</b>
1991/92	2,337,168	1,660,641	71%	36.5%
1992/93	2,503,545	1,682,048	67%	34.9%
1993/94	2,760,674	1,759,115	64%	35.3%
1994/95	2,673,506	1,598,565	60%	35.3%
1995/96	2,563,395	1,446,582	56%	N/A
1996/97	2,716,821	1,746,911	64%	37.0%
1997/98	2,748,737	1,824,628	66%	38.6%
1998/99	2,861,585	1,955,663	68%	39.9%
1999/00	3,058,576	2,007,703	66%	41.0%
2000/01	3,058,909	1,936,848	63%	41.1%

Source: Adapted from the Rotorua Visitor Monitor (1992, 1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000).

**Table 3.5 Comparison of Auckland/Australian Visitor Nights in Rotorua**

<b>Year ended March 31</b>	<b>Auckland visitor nights in Rotorua</b>	<b>Australian visitor nights in Rotorua</b>
1991/92	605,804	192,967
1992/93	587,169	191,678
1993/94	621,513	198,647
1994/95	563,535	179,138
1995/96	N/A	N/A
1996/97	645,711	197,761
1997/98	703,540	201,803
1998/99	779,268	221,203
1999/00	822,711	261,537
2000/01	795,297	281,642

Source: Tourism Rotorua Visitor Monitor (1992, 1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000, 2001)

The implication is that RTOs such as Tourism Rotorua must balance promotional spend between domestic markets such as Auckland, traditional overseas markets such as Australia, UK, North America, Japan and South East Asia, and the emerging markets of China, India and South America. Tourism New Zealand (TNZ) is only active in offshore marketing, and offers RTOs opportunities for overseas promotions. In the domestic market there is no umbrella organisation and RTOs shoulder more responsibility in marketing strategy design and implementation. Clearly, Auckland remains a key target for Rotorua, and is arguably the most important of all markets.

### **Tension between Tourism Icons and Diversity of New Products**

Butler's (1980) destination life cycle can be linked to the changes in the spatial development of Rotorua's tourism industry. Two aspects of the life cycle appear particularly relevant. Firstly, the examination of Rotorua's history supported Butler's proposal that destinations are dynamic and evolve over time. Secondly, the development of Rotorua's popularity has attracted increasing numbers of entrepreneurs who have developed attractions that have altered the spatial nature of the destination. Regarding the latter, Butler (1980) supported Plog's (1974) assertion that the evolution of destinations can change or obliterate the nature of attractions responsible for the area's popularity: "Destination areas carry with them the potential seeds of their own destruction, as they allow themselves to become more commercialised and lose their qualities which originally attracted tourists" (Plog, 1974, p. 58).

Russell and Faulkner's (1999) analysis of the development of the Australian Gold Coast suggested while destinations do evolve through the life cycle in a similar pattern, the instigators of change can be quite different. Russell and Faulkner introduced chaos theory to the model, to demonstrate the significance of the contributions of a few individual entrepreneurs. Each was responsible for an innovation that stimulated a sequence of changes, resulting in a major shift in the structure of tourism at the destination. In Rotorua however, it is argued that while entrepreneurs have played an important role in tourism development, it has been the initiatives of central and local government that have shaped the destination's development most significantly. A key similarity between the findings of this chapter and those of Russell and Faulkner is the extent to which each resort's natural attractions have been augmented by man-made attractions. These have in turn transformed the nature and extent of tourist activity. For example, built attractions such as the Skyline luge would appear to have little if any connection to Rotorua's natural resources, as would Snow World and Movie World on the Gold Coast. In Rotorua the major influences have included:

- The discovery and appeal of the Pink and White terraces.
- The entertainment and trading skills of the local Te Arawa people, and their early willingness to participate in the fledgling tourism industry.
- The 1886 eruption, which destroyed the Pink and White Terraces.
- The establishment of the Department of Tourist and Health Resorts.
- The government's early commitment to developing spa facilities and geothermal attractions, along with infrastructure and promotional support.
- The international introduction of wide-bodied jet aircraft during the 1960s.
- The increase in entrepreneurial product development since the 1960s.
- Image problems during the 1960s, 1970s, 1980s and 1990s.
- The downturn in domestic tourism in the 1980s.
- RDC's 1990s investment in the CBD upgrade and destination marketing.
- Ending of the restraints on travel from the People's Republic of China.
- The September 2001 terrorism attacks and war in Afghanistan.

The review of Rotorua’s promotional material indicated a strong reliance on the geothermal attractions and Maori culture. It would be expected therefore that touristic images would reflect these. As discussed in Chapter 2, one of the challenges for DMOs is the diversity of stakeholders who may all want their type of product to feature in destination promotions. Tensions have developed between the narrow emphasis of these traditional icons and the new diversified product range, with the major attractions having exerted significant influence on destination promotions. It is suggested that content analysis of Tourism Rotorua promotional material would support this assertion. Notable examples of significant new tourism attraction developments are highlighted in Table 3.6.

**Table 3.6 History of New Tourism Attraction Developments in Rotorua**

1890s	Fairy Springs
1900s	Launch cruises
1930s	Rainbow Springs, Paradise Valley Springs
1960s	Flightseeing, Mount Tarawera four wheel drive tours, guided trout fishing, floatplanes
1970s	Hotel-based hangi and concerts, Agrodome sheep show, ten pin bowling, Putt Putt mini golf, McDonald’s fast food
1980s	White water rafting, Skyline Skyrides gondola and luge, Lakeland Queen Paddle steamer, Orchid Garden, Herb Garden, Rainbow Farm, Leisure World, Jet boating, Tiger Moth Aerobatics
1990s	Hovershuttle, Incentive tour services, Simulator, Indoor carting, Adventure kayaking, Four wheel drive farm bike tours, Harley Davidson tours, Windsurfing School, Tandem skydiving, Marae based hangi & concerts, café scene, Zorb, white water sledging, self drive 4WD off road treks
2000s	Bungy, jet sprint boats, indoor climbing wall

Relatively few recent developments have been directly related to the geothermal and Maori icons. By 1997 there were at least 448 businesses directly involved in Rotorua tourism, comprising (Tourism Rotorua, 1997): 5 Maori hangi and concert operations, excluding hotels; 4 geothermal attractions; 28 other visitor attractions; 27 adventure activities; 36 professional fishing guides; 66 transport operators; 14 visitor information centres; 4 nightclubs; 44 restaurants; 20 souvenir outlets; 200 accommodation suppliers.

## Consistency of Destination Promotion Themes

While Rotorua promoters have used a range of destination promotion messages, there has been a consistency of the type of theme used. Table 3.7 provides a summary of straplines used by the district's promoters. The summary highlights earlier geothermal and health themes, and the shift towards promoting a more diverse array of attractions since the 1950s.

**Table 3.7 Rotorua's Promotional Straplines**

1850s	The thermal wonderland
1870s	The hot springs district
1900s	Sanatorium of the world
1920s	Thermal wonderland
1930s	Cureland
1950s	Wonderland of New Zealand Rotorua has everything
1960s	New Zealand's Thermal Wonderland The playground of New Zealand New Zealand's lovely Lakeland South Pacific all year holiday centre Thermal wonderland Fascinating Rotorua Rotorua for the holiday of your life The curative spa of the South Pacific The fascinating Rotorua radius The tourist diamond
1970s	Rotorua for the holiday of your life The hottest centre in New Zealand
1980s	Sparkling Rotorua Rotorua...full of surprises
1990s	Rotorua...full of surprises Feel the spirit Manaakitanga

A number of other themes for Rotorua appear to have been emergent rather than planned by Rotorua's promoters, including: Rotten egg town, Sulphur City, Geyserland, Rotton-rua, and Rotovegas. The origin of 'Geyserland' is unclear, although the term was used by Warbrick (1934). The two most recurring themes have been associated with 'lots to do' and geothermal/spas. The current theme appears to represent a return to the Maori and geothermal icons. However, the brand was designed to portray a broader range of attributes:

*The new identity was designed to reflect every unique facet of Rotorua. ‘Feel the Spirit’ encompasses it all – our cultural diversity, our stunning natural environment and awe-inspiring earth forces, our sense of adventure, our people, and the spirit of a progressive community (Tourism Rotorua, 1996, p.4).*

Tourism Rotorua’s website currently promotes the brand as representing three of Rotorua’s “core qualities” ([www.rotoruanz.com/rotoruanz/password/index.html.asp](http://www.rotoruanz.com/rotoruanz/password/index.html.asp), 19/9/02):

- Our vibrant Maori culture via the ‘Takarangi’ symbol
- Our historical standing as a visitor destination via the Rotorua typeface
- Our diverse natural environments via the colours

As discussed in Chapter 2, Echtner and Ritchie (1991, 1993) proposed unique features represent an important component of a destination’s image. Three New Zealand studies have however identified a range of unique features of domestic destinations. Table 3.8 shows the consistency in free associations of Rotorua by domestic mail survey respondents.

**Table 3.8 Free Associations of Rotorua**

	<b>Cossens (1989)</b>	<b>Cossens (1994)</b>	<b>Kearsley, Coughlan and Ritchie (1998)</b>
Hot pools/thermal	35.5%	39.0%	25.5%
Smell/stink	27.6%	20.5%	26.2%
Touristy	4.9%	6.0%	7.8%
Maori culture	8.7%	5.7%	18.5%
Unique/different	5.1%	3.0%	
Plenty to do	2.1%	2.0%	3.5%
Lake			4.3%
Scenic/beautiful			3.5%

A recent study by Moore, Fairweather and Simmons (2000) produced different results when they asked visitors to Rotorua what the main attracters were. These are highlighted in Table 3.9. They found that for the domestic visitors, Maori culture was not important. This highlights the importance investigating consumers’ evaluative perceptions of attributes.

**Table 3.9 Top 10 Attractions for Domestic Visitors to Rotorua**

<b>Attraction</b>	<b>Per cent of respondents</b>
1. Thermal	27.4%
2. Visit Lakefront	12.4%
3. Showing friends/family Rotorua	6.1%
4. Shopping/movies/town	4.1%
5. Luge	3.6%
6. Business/conference/work	2.7%
7. Gondola	2.7%
8. Culture/history	2.4%
9. General activities/attractions	2.2%
10. Restaurants/cafes	1.9%
Other	34.5%

Source: Moore, Fairweather and Simmons (2000)

## **Lack of Formal Market Research**

It has been suggested that many of Rotorua's PRO promotions in the 1960s and 1970s were developed "over a bottle of gin at two in the morning" (former deputy PRO, Personal communication, March 1999). Many New Zealand tourism executives have had a production/sales mentality rather than a consumer orientation, possibly due to a lack of available consumer information (Roberts and Henshall, 1982). Roberts and Henshall suggested there was too much focus on visitor arrival statistics, which did not include information on why people visited the destination. Henshall (1982, p. 62) proposed the marketing orientation approach was so basic and yet overlooked due to the daily demands of paperwork for tourism businesses: "Too much promotion effort is not researched". The lack of a market orientation in New Zealand tourism was also discussed by McDermott Associates (1984). More recently, former TIANZ CEO Tony Staniford lamented the lack of tourism industry research in New Zealand. Staniford pointed to "the abysmal lack of information" available, particularly in comparison to Australia (Coventry, 2001f). In early 2001, Tourism Auckland's CEO announced that the organisation was conducting on-going research for the first time (Coventry, 2002).

Two market research reports were commissioned by Tourism Rotorua during the early 1990s. In 1992, following three years of the 'Full of Surprises' campaign, Tourism Rotorua commissioned a study in the Auckland/Waikato region, to measure the effectiveness of the advertising, as well as establish a range of family decision making criteria. The following were key points (Media One, 1993):

- 51 percent had previously visited Rotorua.
- Of those who had visited Rotorua in the last two years, 91 per cent had done so at least three times.
- As a summer holiday destination Rotorua rated poorly in comparison to northern beach areas. Rotorua had most appeal for Aucklanders who had visited in the past 12 months.
- Rotorua enjoyed the highest advertising recall, with 9 per cent of the population able to do so unprompted.
- Rotorua rated strongly as a place to spend time with family, and change in environment.
- Rotorua rated poorly in terms of price and offering a chance to relax.

A comparative study in 1995 (APR, 1995b) produced similar results:

- 49 per cent had previously visited Rotorua.
- Rotorua continued to rate poorly as a summer holiday destination. Only 1.7 per cent would be likely to holiday in Rotorua if they and their family took a holiday in New Zealand for 1-2 weeks.
- 29 per cent stated a likelihood to visit again (40 per cent).
- 57 per cent felt Rotorua was right at any time of year (54 per cent).
- 89 per cent rated Rotorua's distance from home about right (83 per cent).
- 56 per cent rated Rotorua as about the right cost (48 per cent).
- 78 per cent felt there was a large range of activities for children (71 per cent).

Tourism Rotorua may be evolving towards a marketing orientation. However, there has been a lack of market research activity. For example, given the importance of the Auckland market, it is interesting to note that Tourism Rotorua had not conducted any perceptions research in the Auckland market since 1994. However, Pike (1998) also found of the 13 RTOs that regarded Auckland as either the first or second most important market, only six had conducted perceptions research in the region during the previous five years. Auckland is one of a portfolio of important markets for Rotorua and limited resources are used globally. However, no perceptions research in any other markets had been commissioned by the organisation between 1995 and 1999 (Tourism Rotorua marketing manager, Personal communication, November 1999). Funding was a factor: "As you know Steve, research is always the first to get cut in the budget planning" (Personal communication, December 1998).

However, this is not a uniquely New Zealand situation. It is not uncommon for DMOs to be guided by a product orientation or selling orientation, both of which are dominated by supply side issues (Ashworth and Goodall, 1988). Bramwell and Rawding (1996, pp. 213-214) noted the lack of research used by some British destination marketers, and included the following comment by the CEO of a Convention and Visitor Bureau on the development of a city image during the 1990s: "The image was chosen because it is the facts, it is the reality. We did no market research to create an image...We promote the facts, we don't go in for gimmicks". Richardson and Cohen (1993) reported examples in the USA, where State destination advertising failed to communicate appropriate unique selling propositions. Also in the USA, Curtis (2001, p. 80) reported on the failure of Oregon's tourism commission to evaluate the success of a major repositioning campaign with consumer research. The multi-million dollar campaign was evaluated by the number of enquiries and the amount of advertising awards rather than a study into consumer evaluations of the campaign's effectiveness. Plog (2000) observed it was amazing the number of tourism operators who make continue to make decisions 'by the seat of their pants'. Masberg (1999) concluded from an assessment of CVB research programmes in the USA that while the

organisations espoused the importance of research, not enough was actually being completed.

It is difficult to quantify the contribution of a DMO's efforts in generating increased visitors (Faulkner, 1997). However the case of Colorado provides an indication of the implications of reduced DMO promotional activity (see Donnelly and Vaske, 1997). Due to a withdrawal in government funding in 1993 Colorado became the only state without an active DMO. As a result, visitor numbers and spending declined, as did consumer perceptions. In Rotorua, this could be summed up in the words of Tourism Rotorua international marketing manager, Earl Bunting, who was commenting on the success of the 2000/2001 summer season: "There's a number of factors why this season is so busy – we would like to think we had something to do with it as well as the effects of the low dollar coming through" (The Daily Post, 15/1/01). Similar comments from Totally Wellington CEO Rob MacIntyre: "Although we track the success of our ad campaign 'Send Yourself to Wellington' through 0-800 responses, web traffic and hotel occupancy, it is very hard to quantify the return on our investment in the destination brand" (Coventry, 2001d).

## **Chapter Summary**

The chapter presented a historical review of the evolution of destination promotion by Rotorua. The aims were to identify factors that might have contributed to the development of Rotorua's image in the Auckland market, in a way that would also enable analysis of the relationship between projected images and those held in the market. Three key contributory factors are proposed. First, the resources of central government in promoting Rotorua as New Zealand's first tourist destination. While the relatively high level of government support has been an obvious advantage for Rotorua, the closure of the NZTP Travel Offices marked the end of a promotional era for the district. The closures exposed a critical weakness locally. Due to the unparalleled level of Government support for tourism, Rotorua has only been forced to be truly independent in destination promotion since 1989. This meant the district had to adapt fast to move from product led promotion to a market orientation. It would be expected that the

impact of government resources would have been a significant influence on Rotorua's profile in Auckland. Second, Rotorua has suffered from negative images in the travel trade and domestic media, which contributed to a dowdy image from the 1970s. Third, Rotorua's destination promotion themes have tended to focus on three features: geothermal/spa, Maori culture experiences and range of attractions.

# Chapter 4 - Method

This chapter presents the methods used to operationalise the proposed model of destination attractiveness presented in Chapter 2. As discussed, Mayo and Jarvis (1981) proposed destination attractiveness was a function of the benefits sought by travellers and the ability of the destination to provide these. Two separate stages of data collection were required; firstly to identify the range of salient attributes, and secondly to determine the perceived performances of the competitive set of destinations.

The first research stage required the identification of attributes deemed salient by Aucklanders when differentiating domestic short break destinations. Many destination image studies have relied on structured questionnaires designed without input from consumers. It has been claimed that often the attributes used in destination image surveys have been “chosen at random” (Pearce, 1982, p. 149). In this regard Dann (1996a, p. 43) strongly supported the call for researchers “to bring the tourist back into their investigations”. This research stage therefore required a technique to elicit the consumer perspective. The second stage of the research required a technique to identify the market position held by Rotorua, across the range of salient attributes, relative to competing destinations. For the purpose of the thesis, a destination position was defined as:

*A destination's perceived ability to provide the attributes deemed determinant to the target segment, for a specific travel context, relative to the competitive set of places.*

Three techniques were selected for this stage: Importance-Performance Analysis (IPA), Multi-Dimensional Scaling (MDS) and Affective Response Matrix.

## **Stage 1 - Identification of Salient Attributes**

One of the thesis goals was to compare and contrast the demand-side and supply-side perspectives of attribute salience, since the efficacy of using attribute lists based on supply side opinions has been questioned. For example, McCullough (1977, cited in Stringer 1984) found differences between travel agents and their clients, in their perceived importance of various attributes. Similarly, McLennan and Foushee (1983) found significant perceptual differences between tour operators and travellers. Witter (1985) found differences in destination image perceptions between local retailers and tourists. Walmsley and Jenkins (1993) also found perceptual differences between tourists and tourism workers. This section begins with an outline of the Repertory Grid technique, which was used in personal interviews with Aucklanders. This is followed by the results of personal interviews with tourism practitioners from five regions. Thirdly, the range of attributes used in 84 destination image papers published in the literature during the period 1973-2000 is discussed. The section concludes with the selection of twenty attributes for use in the second research stage.

Alternative qualitative methods used in destination image studies have included: free descriptions (Reilly, 1990), Q-sort descriptions (Stringer, 1984), personal interviews (Crompton 1979b, Crompton and Duray 1985, Goodrich 1978a, Illum and Schaeffer 1995, Pizam et al. 1978, Waitt 1996), focus groups (Chen and Kersletter 1999, Chon, Weaver and Kim 1991, Cossens 1994, Driscoll and Lawson 1990, Echtner and Ritchie 1993, Haahti and Yavas 1983, King 1994, Kearsley et al. 1998, Mackay and Fesenmaier 1997, Milman and Pizam 1995) and Repertory Grid (Pearce 1982, Walmsley and Jenkins 1993, Young 1995). Repertory Grid was selected as being suitable for the thesis, for three reasons. Firstly, the technique appeared ready-made for examining how individuals differentiate destinations. Secondly, the procedure offers the operational advantages of being a structured technique with economy of data for analysis (Stewart and Stewart, 1981). Thirdly, the technique is based on strong conceptual foundations developed in Kelly's (1955) personal construct theory (PCT).

## Personal Construct Theory

Kelly's (1955) PCT viewed individual man as a scientist, whose ultimate aim was to predict and control his own world. At the core of PCT is constructive alternativism, which proposed that man has the creative capacity to interpret his environment, rather than simply respond to it in a stimulus-response manner. We all construe the universe in different ways, and it is open to reconstruction. Our world is viewed through patterns that we individually create and attempt to fit over the environment. Even though the fit is not always very good, without such patterns the world would appear homogenous and difficult to make sense of. Kelly referred to these patterns, which allow us to chart a course, as personal constructs. These constructs have also been referred to as "dimensions of awareness" (Landfield and Leitner, 1980, p. 5), and "goggles for viewing the world" (Downs, 1976, p. 82). Our individual construct system is the only model used to guide behaviour (Jankowicz, 1987).

Anticipation is the reason for construing. "If we were not anticipating regularities in behavior, why should we become upset about sudden change?" (Landfield and Leitner, 1980, p. 5). Such anticipation may be linked to the concept of the self-fulfilling prophesy, where for example a racist may believe certain others are 'trouble'. When meeting such others, belligerent attitudes lead to 'trouble', and therefore confirm the accuracy of the belief. We all have a repertoire of constructs that are continually being tested and altered, in an attempt to aid our predictive efforts. This repertoire is not always formalised and articulated. Some constructs may be verbal, others not. Some may be tightly structured, others not. Some may be easily testable, others not. Some are idiosyncratic, while others may be widely held. They are otherwise referred to as personality, attitudes or habits. Kelly's (1955, p. 46) fundamental postulate, or basic assumption, was that "a person's processes are psychologically channelized by the ways in which he anticipates events". Channels were described by Kelly as a network of pathways, flexible but structured in the facilitation and restriction of an individual's range of action. Kelly provided 11 corollaries, or propositions, to support the central postulate:

## **1. Construction Corollary**

Events are anticipated by interpretation of what is being construed. Since this is our own construction system, anticipation is developed by us and not by that which is being interpreted. We achieve this by categorising stimuli on the basis of similarities and differences, through repetitive themes. Bannister and Fransella (1971) used the example of the construct 'dinner', which, while potentially different every time, has an explicit sameness. When an event has been adequately defined in such a manner, we are able to predict outcomes. Post assessment of outcomes may result in a change in the construct system, and then future anticipation and prediction. This is similar to a scientist testing hypotheses (Kelly, 1955), albeit more crudely (Bowler and Warburton, 1986). However, while our interpretations of the universe are subject to revision or change, the existence of stereotyping indicates that some interpretations are relatively fixed. Kelly (1970a, p.3) did note that we tend to be creatures of habit:

*Our ingenuity in devising alternative constructions is limited by our feeble wits and our timid reliance upon what is familiar. So we usually do things the way we have done them before or the way others appear to do them.*

That which is being construed is usually referred to as an event, stimuli or element. These may include people, events or objects. Experiences at holiday destinations represent events, which may be categorised and discriminated between. Habit is a useful behavioural tool for travellers who may find that satisfaction obtained from limited, if any, search effort can be quite cost effective. This may have important implications for short breaks.

## **2. Individuality Corollary**

Individuals will differ from others in their construction of an event, since no two people can have exactly the same experience. This relates to heterogeneity and inseparability in the services marketing literature, where in tourism, visitors to the same destination may have quite differing perceptions of the same products or services.

### **3. Organisation Corollary**

Our construction system is organised in such a manner that one construct may subsume another. For example, in good versus bad, good might subsume intelligent versus stupid, and/or honest versus dishonest. In the case of holidays a 'good destination' may subsume a range of subordinal constructs such as 'friendly', 'good value' or 'lots of attractions' for example.

### **4. Dichotomy Corollary**

Construct systems are composed of a finite number of dichotomous constructs. Our thinking is therefore channelised, along a dichotomous continuum, where we have a choice between the two ends of the construct, or somewhere in between. "Each pathway is a two-way street; he can move either up or down the street, but he cannot strike out across country without building new conceptual routes to follow" (Kelly, 1955, p. 128). Kelly (1970a, p. 13) later suggested that constructs were always black and white rather than shades of grey: "A construct is the basic contrast between two groups".

### **5. Choice Corollary**

Since our thoughts are channelised, we must choose between the poles of the dichotomies, in favour of the alternative that best meet our anticipation of an event. Usually, people will act to achieve positive outcomes and avoid negative outcomes (Preston and Taylor, 1981). Our turmoil is often then whether to choose relative certainty and security, or adventure and the possibility of negative consequences. In the case of holiday options, this manifests in the choice between an untried destination and one that has been previously visited and would therefore be more familiar and less risky.

### **6. Range Corollary**

Few constructs would be relevant to everything in an individual's universe. Each personal construct will only be convenient for the anticipation of a limited range of events. A construct's range of convenience is where the construct works reasonably well. For example, a destination's 'accommodation' would have a limited range of convenience, whereas it would be expected that 'good value' would have a much a wider application.

### **7. Experience Corollary**

Kelly (1970a) believed that experience comes from the act of construing a series of events, not merely by being a participant in, or exposure to them. Experience is a cycle of five phases: anticipation, investment, encounter, confirmation or disconfirmation, and revision. This validation in the post assessment of events leads to the evolution of the construct system. Therefore in any assessment of a destination, the actual visit is part of a process of feedback, where experience is referenced to anticipation, as measured in SERVQUAL-type gap models or expectancy-value models as developed by Fishbein (1967).

### **8. Modulation Corollary**

The construct system is limited by the permeability of its constructs. Within any range of convenience, permeability allows new elements or experiences to be added and construed within the framework. An example of a permeable construct is 'good', which continually extends its range of convenience (Bannister and Fransella, 1971). The previously mentioned sub-ordinate construct examples, 'friendly', 'good value' or 'lots of attractions' are possible examples of permeable constructs open to new destination options, whereas 'Maori Culture' would be much less permeable.

### **9. Fragmentation Corollary**

The same individual may use a number of apparently incompatible construct subsystems. Not all subsystem decisions necessarily add up to a super-ordinate construct, which may lead to perceived inconsistencies in behaviour. Kelly (1970a) referred to this type of behaviour as that commonly described as 'irrational'. Kelly did not see such behaviour as necessarily bad, since logic can be an interference with an individual's ventures. In tourism for example, the purchase of travel insurance and a visit to a casino or a purchase of a stand-by air ticket by the same consumer might appear incongruent.

### **10. Commonality Corollary**

The individuality corollary does not rule out the sharing of experiences, since common ground may be found in the way that the similarity/difference of stimuli is categorised. While no two people can have exactly the same psychological

processes, there might be similarities in the interpretation of an experience (Kelly, 1970a). This is akin to segmenting a population into lifestyle clusters, or perhaps more colloquially, 'birds of a feather fly together'.

### **11. Sociality Corollary**

To participate in a social relationship, an individual must be able to construe the other person's thinking. In other words, we need to be able to understand and predict the other's behaviour, at least to some extent. Kelly's (1955) theory represented a new way of thinking about personality that did not include traditional concepts such as learning, motivation, emotion, cognition, stimulus, response, ego, unconsciousness, need, reinforcement or drive. This proposition has an attraction for non-psychological researchers (Downs 1976, Stringer 1984): "For a nonpsychologist, the loss of such organizational landmarks and the wholesale slaughter of sacred cows is cause for celebration in itself" (Downs, 1976, p. 73). Indeed, Fishbein and Ajzen (1975) noted over five hundred methods had been used to measure attitude. A decade later Morello (1983) reported there were over five hundred descriptions of attitude. How many must there be now?

### **Holiday Anticipation**

An individual's holiday goals are likely to be experiential (Botterill and Crompton, 1996), fitting Kelly's (1955, 1970a) view of behaviour as an experiment. Stringer (1984), for example, proposed a strong congruence between PCT and the element of anticipation in holidays. The holidaymaker encapsulates Kelly's model of man, as summed up in this comment by a respondent of Woolley (1977, cited in Stringer 1984, pp. 27-28):

*I think that travelling is the best education anybody could ever have, in learning about life. Life is like a game: you never know what is going to crop up around the corner. The more difficulties you come up to, the better you will handle them, the more you will see what is going to happen.*

Botterill's (1989, p. 291) series of pre and post-travel Repertory Grid interviews over a period of eight months resulted in the participant acknowledging "an advancement in his thinking over the period of the research". Other research

supports this theory of personality. For example, Hall and Lindzey (1970, p. 289) discussed a study carried out in the 1940s by Allport, which became known as the Jenny Masterton letters. Allport's research involved a series of analyses of 301 letters by Jenny, to a young married couple, over a period of twelve years. The analyses revealed a number of Jenny's key personality traits. While the traits did not reveal a structure of personality, Hall and Lindzey pointed to Allport's proposition that in looking at the consistency of Jenny's behaviour, future actions could be predicted from past conduct.

To gain access to, and comprehend, private world of individuals' construct systems, Kelly (1955) developed the Repertory Grid technique.

### **Repertory Grid Technique**

Kelly (1955) devised the Repertory Test as a technique for eliciting an individual's repertoire of personal constructs. The original form of the technique, which was interested in the elicitation of constructs, was termed the Role Construct Repertory Test (Bannister and Fransella, 1971). The technique was further developed as the Repertory Test and Repertory Grid to examine the hierarchy of relationships between the constructs elicited. It was the original purpose, of construct elicitation, that was of interest to the thesis, since the technique helps to identify how individuals categorise and differentiate a category of objects. However, in order to be consistent with wording used by other researchers, the term Repertory Grid has been used instead of Repertory Test. Also, 'test' is not a useful description in the context of the thesis, as the technique would not be used to measure any individual's performance.

While the international PCT research community is small (Botterill and Crompton 1996, Jankowicz 1987), Repertory Grid provides an effective alternative to other qualitative methods: "Its ideographic, humanistic and non-exploitive basis is consistent with the rationale of public participation" (Stringer, 1974, p. 33). Also, the unified theory and technique has strong face validity due to the level of freedom the respondent has in making judgements (Downs 1976, Smith and Leach 1972). Best viewed as a form of structured interview, a person's construct

system is explored through conversation (Fransella and Bannister, 1977). Conversation helps us understand how others view their world, and Kelly (1955) designed the Repertory Grid as a simple way to formalise this process.

Although developed for use in clinical psychology, the technique has been applied in other fields. "At its simplest, Grid provides a way of doing research into problems - almost *any* problems - in a more precise, less biased, way than any other research method" (Stewart and Stewart, 1981, p. vii). Stewart and Stewart demonstrated the use of the grid in a number of fields, including quality control, work motivation, managerial effectiveness and training evaluation. Other applications have included the assessment of management training needs (Honey, 1979), personnel management as a career option (Tyson, 1979), managerial jobs (Smith, 1980), counselling (Jankowicz and Cooper, 1982), perceptions of God (Preston and Viney, 1986), organisational behaviour (Jankowicz, 1987), retail store attributes (Mitchell and Kiral 1999, Keyt, Yavas and Riecken 1994), information system attributes (Whyte and Bytheway, 1996), perceptions of software quality (Wilson and Hall, 1998), attitudes towards technology (Frewer, Howard and Shepherd, 1998) and theatrical character development (Cruise and Sewell, 2000).

### ***Suitability for Market Research***

Repertory Grid has been recommended as suitable and practical for market researchers (Frost and Braine, 1967). This was the first industry sector outside of clinical psychology to apply the technique (Stewart and Stewart, 1981). In particular, the technique was adopted widely by British market researchers (Sampson, 1972). Repertory Grid's usefulness in market research is that descriptions are provided of products in the consumer's language (Stewart and Stewart, 1981). Also, important variables are elicited, that the researcher may not have come up with (Ryan, 1991b). Frost and Braine (1967) even suggested that the method had been rated as important to market research as the development of the questionnaire. They proposed the following unique properties of scales derived from the method:

- They represent an exhaustive set.
- They are relevant to the subject matter.
- They are in the vocabulary of the consumer.
- The inarticulate may not otherwise be able to express them spontaneously.
- The constructs have dimensionality, capable of simultaneously categorising and discriminating between the objects under scrutiny.

While Kelly did not show any interest in tourism (Botterill and Crompton, 1996), Repertory Grid was almost ready made for the study of environmental images (Bowler and Warburton 1986, Downs 1976, Harrison and Sarre 1971, Preston and Taylor 1981). Preston and Taylor suggested Kelly would have approved of the extension of the technique from person to environment, since he regarded the theory as all encompassing in the way we view the world. Environment applications by geographers have included such diverse topics as: the cognitions of recreational water resources (Bowler and Warburton, 1986), shopping centres (Hudson 1974, Smith 1989), residential choice (Preston and Taylor, 1981), recreation trails (Allton and Lieber, 1983) and the effects of a park's conservation programme on school children (Ryan, 1991b).

The link between Repertory Grid and the conceptualisation of destination image in the thesis was Harrison and Sarre's (1971) proposition that because an environment's image is multi-attributed, it is subdivided by beliefs held about its components. As shown in Appendix A, destination image applications of Repertory Grid have been rare, relative to the volume of literature published in the field. Eight such papers were sourced, which investigated: attitudes towards seaside resorts (Riley and Palmer, 1975), dimensions of countryside locations (Palmer, 1978), differences between images of destinations pre and post travel (Pearce, 1982), analysis of a destination's image through holiday snapshots (Botterill and Crompton, 1987), images held of Austria by British tourists (Embacher and Buttle, 1989), images of Japan (Botterill, 1989) and images of domestic destinations in Australia (Walmsley and Jenkins 1993, Young 1995).

Outside of destination image studies, tourism applications appear to be rare. These have included an individual's travel experiences (Botterill 1989, Botterill and Crompton 1996), holiday brochures (Andrew 1977, in Stringer 1984) and analysis of travel mode choice (Tilic 1978, in Stringer 1984).

Two key issues in the application of Repertory Grid are the selection of elements, and the elicitation of constructs. However, prior to introducing these, a discussion on sampling is necessary.

### ***Sample Selection***

A strength of the technique is the high degree of flexibility in application and analysis (Frost and Braine 1967, Harrison and Sarre 1971). In Kelly's field of clinical psychology, Repertory Grid was developed for application to individuals. However, Kelly (1955) and Levy and Duggan (1956) discussed the technique's potential suitability for administering to groups. Later, Bannister and Fransella (1971) espoused the ability of the technique to provide group data. Within a standardised framework, participants have freedom to respond, which enables a comparison between participants in a group (Smith and Leach, 1972). With group studies, interviews have still generally been conducted on an individual basis, although the technique has also been applied to groups of around eight people (see Honey 1979, Stewart and Stewart 1981). Stewart and Stewart found group applications greatly reduced the amount of time involved, and provoked interesting discussion at the conclusion. This may be a form of structured focus group.

In qualitative research there is no rule regarding sample size (Patton, 1990). Rather, it is recommended sampling should achieve redundancy, to reach a point where little significant data will be elicited from new respondents. An advantage of Repertory Grid is that a large sample is not required to reach redundancy (Frost and Braine 1967, Young, 1995). Frost and Braine suggested that due to a commonality of responses, no new constructs are elicited after 20-40 interviews, except those that are individually specific. Bowler and Warburton's (1986) study elicited few new constructs after 15 subject interviews. Downs (1976), referring to

the commonality corollary, strongly defended the use of small samples in environmental image studies.

A large representative sample of the Auckland population was therefore not required, nor practical, for this stage of the research. However, an attempt was made to ensure the sample was purposeful, which requires the selection of information-rich cases (Patton, 1990). Sampson (1972) investigated respondent performance in terms of the nature and number of constructs generated, and found that performance was not related to sex, age or social class. However, performance was related to divergent thinking, where such thinkers could generate more constructs. Sampson suggested that while time could be saved from using only divergent thinkers, valuable data would be missed by not using convergent thinkers. The thinking style of participants interviewed for the thesis was not pre-determined. A stratified sample was selected to incorporate two distinct groups of respondents, who it was felt would be short break participants. These were young singles and middle class business managers.

A total of 25 participants were interviewed individually, in Auckland, during the period October 28<sup>th</sup> to December 15<sup>th</sup> 1999. Firstly, business students at the Manukau Institute of Technology were invited to participate, and a quota of 10 students responded. In return, a donation of \$100 was provided to the student association. Secondly, 15 managers from Auckland's business community were selected using a variation of the snowball technique, following Patton (1990). The president of the Ellerslie Sunrise Rotary Club was approached with a request to ask member Rotarians, who had taken a short break during the previous year, to participate in the study. Four members volunteered. At the completion of each interview, participants were asked to provide the name of another member of the Auckland business community who would be suitable for such an interview. None of the ensuing approaches for interviews were rejected.

Of the 25 participants, 15 were male and 10 female. Twelve were under the age of 40 years, while 13 participants were aged 40 or over. Eight participants had a household income of less than \$50,000 per annum, while 17 had a household

income of \$50,000 or greater. Four participants resided on Auckland's North Shore (Birkenhead, Devonport and Torbay), four in South Auckland (Papatoetoe and Pukekohe), four in the central suburbs (Remuera, Ellerslie and Mt Albert), while thirteen resided in the eastern suburbs (Howick, Pakuranga, Bucklands Beach, and Beachlands). The sample characteristics are shown in Table 4.1.

**Table 4.1 Characteristics of Repertory Grid Participants**

	<b>Managers (n = 15)</b>	<b>Young Singles (n = 10)</b>	<b>Total (n = 25)</b>
Male	9 (36%)	6 (24%)	15 (60%)
Female	6 (24%)	4 (16%)	10 (40%)
Aged under 40	2 ( 8%)	10 (40%)	12 (48%)
Aged 40+	13 (52%)	0	13 (52%)
Household income < NZ\$50,000	1 ( 4%)	7 (28%)	8 (32%)
Household income > NZ\$50,000	14 (56%)	3 (12%)	17 (68%)
North Shore	4 (16%)	0	4 (16%)
South Auckland	1 ( 4%)	3 (12%)	4 (16%)
Central suburbs	3 (12%)	1 ( 4%)	4 (16%)
Eastern suburbs	7 (28%)	6 (24%)	13 (52%)

The sample size represented the mid-range of those used in previous destination image applications of Repertory Grid: one participant (Botterill and Crompton 1987, Botterill 1989), 10 (Pearce, 1982), 25 (Embacher and Buttle, 1989), 40 (Walmsley and Jenkins, 1993), 50 (Young, 1995) and 60 (Riley and Palmer, 1975). It should be noted that the samples used in most of these studies were involved in research to not only elicit constructs, but also to determine the perceived performance of destinations across the range of constructs elicited (see Riley and Palmer 1975, Pearce 1982, Botterill and Crompton 1987, Embacher and Buttle 1989, Walmsley and Jenkins 1993).. Data analysis included: Principal Components Analysis, Multi Dimensional Scaling, Cluster Analysis, and programs developed for PCT, such as Shaw's (1980) PLANET suite of software. A disadvantage of using the complete Repertory Grid is the time consuming nature of the procedure, where participants may lose interest (Bowler and Warburton, 1986).

## ***Selection of Elements***

An element is the type of object that is the focus of the study. In this case the elements of interest were domestic holiday destinations in New Zealand. Kelly (1955) provided six assumptions for consideration when interpreting Repertory Grid results. One of these assumptions related to the selection of elements, while five concerned construct elicitation, and are discussed later in the chapter. Kelly's assumption was that the elements used should be representative of those the subject would be likely to relate to in the context of interest. Fransella and Bannister (1977) recommended that elements should also be specific and homogenous.

The number of elements used in Repertory Grid is also an important consideration. Sampson (1972) found the number of stimuli used by researchers generally ranged from 8 to 30. However, smaller and larger numbers have been used. In tourism destination studies the number of elements has ranged from 6 (Botterill and Crompton, 1987) to 40 (Walmsley and Jenkins, 1993).

A further issue is how elements are selected. Elements are usually either supplied by the researcher or elicited from the participants. While there have been attempts to elicit elements from participants in destination studies (see Botterill 1989, Embacher and Buttle 1989), for the thesis, elements were provided to the participants, following Pearce (1982), Riley and Palmer (1975), Walmsley and Jenkins (1993) and Young (1995). The following nine elements were selected:

Bay of Islands	Coromandel	Gisborne/Eastland
Napier	Rotorua	Ruapehu/Tongariro
Taupo	Tauranga/Mt Maunganui	Waikato

Each of these is a major North Island holiday destination, within a half-day drive of Auckland, and represented by an RTO. These destinations are shown in the map of New Zealand presented in Chapter 3. Of the 25 RTOs recognised by the New Zealand Tourism Industry Association in 1999, 14 were in the North Island. The

nine destinations selected were considered to be within the limits of driving time for a short break. This was confirmed during the interviews, with general unsolicited agreement from participants that the following three destinations were too far for a short break holiday, by car: Napier, Gisborne and Ruapehu. Interestingly, Waikato was considered to be too close, which was consistent with Ryan's (1983) finding that less than only 10 per cent travelled to short break destinations that were within 50 miles.

While the Bay of Islands does not have its own RTO, the area is a domestic holiday destination in its own right and is more specific than the entire Northland region represented by Destination Northland. In this regard, major tour operator, Fullers Northland, changed its name to Fullers Bay of Islands in 2000. Gisborne was added to the Eastland label, since from the author's previous consulting experience for the region, it was felt participants may have difficulty with Eastland, traditionally known as East Cape. While the elements were a mix of cities, towns and provinces, they were specific, relatively homogenous and broadly representative of domestic holiday options.

### ***Eliciting Constructs***

At the core of PCT is Kelly's (1955) definition of a construct as "a way in which things are construed as being alike and yet different from others" (p. 105). For construed, read interpreted or categorised and differentiated. Kelly proposed the minimum for any one construct is three elements, since constructs cannot be expressed unless involving at least two things that are alike in some way and one that is different. The label expressed for the similarity/difference, is representative of a personal construct (Embacher and Buttle 1989, Frost and Braine 1967, Harrison and Sarre 1971, Stewart and Stewart 1981, Walmsley and Jenkins 1993). In market research, using brands as stimuli, elicited responses represent a prediction. It has been proposed that it is difficult for a subject to fake answers in a grid interview, even if they have some knowledge of the technique (Easterby-Smith, 1981). As previously mentioned, five of Kelly's six assumptions were concerned with construct elicitation. Two of these were relevant to destination elements in this thesis. Elicited constructs should be permeable, that is open to

new elements, and they must be able to be verbally communicated, so the researcher can understand them.

The number of different variations in the interview method is almost limitless (Frost and Braine, 1967). However, four key considerations should be taken into account in the construct elicitation process when it is based on PCT: the presentation of elements to participants, instructions to participants, recording of responses, and the synthesis of elicited constructs.

### ***Presentation of Elements***

Kelly's (1955) minimum context card form of triad presentation was used. This has been the most common approach in Repertory Grid (Fransella and Bannister (1977), and has been employed in tourism applications (see Botterill and Crompton 1987, Pearce 1982). Elements are presented to participants in sequential sets of three, or triads, since as discussed, Kelly believed three elements to be the minimum required. Kelly acknowledged that two objects could be differentiated between, but argued that without a reference to similarity, the difference would probably represent a chaotic heterogeneity. Dyads were utilised in an environmental image study by Smith (1989), who reasoned that elderly participants find this easier to understand than triads. Botterill and Crompton (1996) used a mix of triads and dyads.

It is important to recognise the large number of possible triad combinations for the number of elements being used. Burton and Nerlove (1976) provided the following formula for the number of triad combinations in a complete test, where every possible combination of elements is used:  $n(n-1)(n-2)/6$  , where  $n$  = number of elements. Using the formula, eight elements, for example, would require 56 triads, while 15 elements would necessitate 455 triads. While there are no fixed rules regarding the number of triads to be presented (Fransella and Bannister, 1977), using all possible triads can be too time consuming. Kelly (1955) referred to preliminary tests indicating that 40 sorts of 20 elements will have elicited virtually all constructs, with 20 elements producing as many constructs as 30 elements. Walmsley and Jenkins (1993) found in a pilot study that 40 triads could be

considered by an individual in 30 minutes, and therefore limited their number of triads to this number. Actual time taken in their interviews varied from 20 to 50 minutes. Young (1995) used 44 triads, after a pilot study found that this was the amount that could be considered by an individual in 40 minutes. Chokor's (1991) participants averaged 15 to 20 minutes to elicit responses from 30 triads. Smith's (1989) elderly participants averaged 70 minutes to cover 24 dyads.

Burton and Nerlove (1976) assessed reliability of balanced incomplete block designs, which consist of a sample of the full set of triad combinations, and where all pairs of elements feature in the same number of triads. The number of triads required in a balanced incomplete block is determined by:  $b = \lambda n(n-1)/6$ , where  $b$  is the number of triads in a balanced incomplete block design,  $\lambda$  represents the number of triads in which each pair of elements appears, and  $n$  is the number of elements. Two further conditions are required:  $rn=3b$  and  $\lambda = 2r/n-1$ , where  $r$  is the number of replications of each element.

Burton and Nerlove (1976) provided tables of balanced incomplete block designs for nine to 25 elements, where because of the conditions outlined, some combinations of  $n$  and  $\lambda$  are not possible. For 15 elements the 455 triads required in a complete set can be reduced to 35 triads where  $n$  is 1, or 70 triads where  $n$  is 2. Burton and Nerlove's two experiments, with domains of nine and 15 elements, indicated high reliabilities for designs where  $\lambda$  is 2 or higher. Chokor (1991) used Burton and Nerlove's formula to select 30 out of a possible 120 triad combinations for 10 elements. The full set of combinations for the nine elements in this thesis would have required 84 triads. Using the balanced incomplete block design formula, with  $\lambda = 2$ , the number of triad combinations was reduced to 24. The following random order of triad combinations was provided by Burton and Nerlove (1976):

1,2,3 4,5,6 7,8,9 1,4,7 2,5,8 3,6,9 1,5,9 2,6,7 3,4,8 1,6,8 2,4,9  
3,5,7 3,4,5 6,7,8 9,1,2 3,6,9 4,7,1 5,8,2 3,7,2 4,8,9 5,6,1 3,8,1  
4,6,2 5,7,9

Each element randomly appeared eight times, with each pair of elements featuring twice. The destinations were listed in alphabetical order, and triads were presented to participants in the order shown above. The first triad presented was Bay of Islands, Coromandel, and Gisborne/Eastland.

### ***Instructions to Participants***

A prefatory statement was used to assist participants organise their thoughts, following Patton (1990, p. 321). This introduced the subject to the purpose of the interview and how the information would be used. Participants were advised their responses would be treated anonymously, and analysed in a pool along with the responses of the other participants. While Repertory Grid allows for flexibility in application design, the most common approach utilises a structured stimulus-response method (Frost and Braine, 1967). The instruction used to elicit constructs is critical. Kelly's (1955) original instruction, when presenting each triad, was: "In what *important way* are two of them alike but different from the third" (p. 222).

A trial triad introduced participants to the technique, using car brands, following Embacher and Buttle (1989). The car examples used in this instance were Falcon, Commodore and Mazda RX7. Respondents had no difficulty differentiating two brands that were more alike and different to the third. Responses generally reflected the commonality corollary, with the typical response being: "Falcon and Commodore are alike because they are sedans, whereas the RX7 is a sports car". However, the individuality corollary was evidenced with an idiosyncratic comment from a female student: "Commodores and RX7s are similar because they are used by boy racers!"

The usual method of presenting triads is with symbols, such as verbal labels, printed on individual cards. Other forms of element presentation in environment and tourism studies have included sets of urban maps (Stringer, 1974) and photographs (Botterill 1989, Botterill and Crompton 1987, Botterill and Crompton 1996, Chokor 1991). The nine destination names were printed on separate white

cards, 150mm x 40mm. Participants were advised that it did not matter if they had not previously visited any of the destinations, because their perceptions of places were of interest. In general however, participants appeared familiar with the nine destinations used. The first combination was presented with the following question: *If you were considering a domestic short break holiday, using your car, in what important way are two of these destinations alike, and different to the third?*

Sampson (1972) found using the question; ‘tell me one way in which two of these are alike and different from the third’ was a more effective generator of attributive rather than evaluative judgements than a question such as: ‘Tell me one way in which you like two of these and dislike the third’ (p. 80). Participants were encouraged to supply more than one statement, and advised that the same response could not be used twice during the interview. It was suggested to participants that the process would therefore become increasingly difficult, and perhaps akin to squeezing the last drops of juice from a grapefruit. Other destination researchers have applied the no-repeat instruction (see Embacher and Buttle 1989, Riley and Palmer 1975). Since the purpose of the interviews was to generate differentiating attributes rather than semantic differential scales, the opposite or different pole was not sought from participants. It was also felt this would be too time consuming.

The use of reinforcement and feedback when conducting personal interviews is important (Patton, 1990). This became apparent when most participants sought reassurance that their responses were suitable, given the perceived simplicity of their statements, and novelty of the technique. This was usually important for the first triad, and again after about six triads when new similarity/difference statements were becoming difficult to generate. Such reinforcement enabled respondents to recognise they had made a valuable contribution. Participants were also reassured that the interview was not a test. Indeed, the number of constructs elicited is not correlated with intellectual ability (Kelly, 1955).

Ryan (1991a) suggested that people start to repeat similarity/difference statements after as few as eight responses. Hudson (1974) would not terminate interviews until six consecutive triads failed to produce a new construct. For the thesis, if participants were unable to elicit new statements for a triad, one further triad was presented. Finally, when no new statements were forthcoming, all nine cards, in Kelly's (1955) full context form, were placed in front of the participant, who was asked: *Finally, do any of these destinations stand out for you as short break destinations, in comparison to the others?* The question 'why?' would often generate one new statement.

### ***Recording Responses***

Participants' similarity/difference statements were recorded verbatim. While Kelly (1955) suggested that a construct could be communicated without losing its reality, this was tempered with a warning that not all constructs could be communicated with a verbal tag or pictorial image. This was borne out one subject stated: "This is difficult to put into words, but... ". It is important to remain silent during such instances in qualitative interviews, to allow the subject to choose their own words (Miles and Huberman, 1994).

### ***Synthesis of Constructs***

Arguably the most critical stage is the analysis of the data (Honey, 1979). While qualitative data is usually voluminous (Patton, 1990), an advantage of Repertory Grid is its economy in data recording, due to the simplicity of responses required from participants (Burton and Nerlove, 1976). The recording system enables one researcher's results to be quickly understood by another reader, since "there is very little waffle" (Stewart and Stewart, 1981, p. 27). Jankowicz (1987, p. 482) proposed the significance of the Repertory Grid is that it avoids the use of metaphors and provides a direct description of the subject's view, and concluded that in occupational applications, an understanding of the content of what an individual says may be more important than understanding the origins in their construct system:

*For Kelly, listening to what the person has to say and taking it at face value - paying attention to content for its own sake, rather than as a symbol for some underlying meaning – become important.*

However, while Repertory Grid interviews generate quite focussed discussion, the technique can generate a substantial list of statements from group applications. For example, Young's (1995) 50 respondents, who were permitted to repeat statements, generated a list of 5,456 constructs. Such a list can be refined since elicited personal constructs may bear close similarities, although differ slightly in individual wording (Frost and Braine, 1967). When participants are not permitted to repeat statements, Frost and Braine proposed the number of responses would generally range from 10 to 30, with a mean of 18. Sampson (1972) suggested a range of 6 to 30 or more. The 25 participants in the thesis generated a total of 567 statements. This raw data is tabled in Appendix B. The mean number of statements elicited from each participant was 23, which was within the range generated in other destination image studies: 11 (Riley and Palmer, 1975), 17 (Walmsley and Jenkins, 1993), 27 (Pearce, 1982). The mean time taken during each interview was 24 minutes, using a mean of 11 triads.

The interpretation of qualitative data is a both a critical and creative process, with no fixed rules (Patton, 1990). In Repertory Grid studies there have been five methods of analysing data (Stewart and Stewart, 1981): frequency counts, content analysis, visual focussing, cluster analysis and Principal-components analysis. Of these, the first two involve analysis of the grid content, which was the purpose of this stage of the thesis.

A feature of Repertory Grid is that large numbers of ideographic data can be aggregated to produce discriminating variables (Stringer, 1984). Many Repertory Grid studies in the tourism literature have not described in any detail how statements were synthesised into constructs (see for example Pearce 1982, Ryan 1991b, Tilic 1978, Walmsley and Jenkins 1993). Young (1995) used content and frequency analyses to reduce data into 79 construct categories, and final selection of seven attributes. Walmsley and Jenkins (1993) summarised their data into 20 constructs. Embacher and Buttle (1989) used content analysis to reorder all

respondents' constructs into 11 clusters. Tillic (in Stringer, 1984) produced 15 content categories, while Pearce (1982) produced 13 categories.

Following Fishbein's (1963) advice for categorising qualitative data, the elicited statements were firstly grouped into themes, where there appeared to be commonality in wording. For example, statements such as 'great beach', 'white sandy beaches' and 'better beaches' were grouped into one theme label. In this way the 567 statements were reduced on a spreadsheet to 119 themes. Such a sorting process is arbitrary (Bowler and Warburton, 1986). It is acknowledged that this was a subjective process, with potential for observer bias. As discussed in Chapter 1, the author's experience included responsibility for the marketing of Rotorua in the Auckland market for a period of seven years, as well as nine years selling and arranging New Zealand travel arrangements. However, personal experience should not necessarily be eliminated from the process of data analysis, since applied qualitative researchers have personal insights and experiences that may be pertinent to any recommendations (Patton, 1990). Of interest was the commonality of label categories, rather than idiosyncratic statements.

The 119 themes were analysed using a frequency count. Miles and Huberman (1994) confirmed the value of counting in qualitative enquiry when there is a large volume of data. The first two participants' statements accounted for 50 per cent of statements used by all participants. The following 24 verbal labels were used by over 30 per cent of participants:

- Driving time 84%
- Fishing 76%
- Touristy 76%
- Beaches 72%
- Water activities 68%
- Close to another destination/able to visit both 68%
- Snow sports 64%
- Walking tracks 64%
- Better weather 60%
- Better promoted 56%
- Lots to do 56%
- Coastal 48%
- Wineries 44%
- More familiar 44%
- Summer locations 40%
- Greenery/nature 40%
- Boating 36%
- Cafes/restaurants 36%
- For older/younger people 32%
- More attractions 32%
- Unique features 32%
- Surfing 32%
- Rural 32%
- Lake activities 32%

Combined, the 24 labels accounted for 57 per cent of the 567 elicited statements. A further 36 labels were mentioned by between 10 per cent and 30 per cent of participants. A form of content analysis was then undertaken in an attempt to categorise all labels into constructs that would show greater commonality: It is proposed these common themes would represent super-ordinal constructs, which in PCT, subsume sub-ordinal constructs. Super-ordinal constructs have been

described as core constructs, which are more important for guiding behaviour (Landfield and Leitner, 1980). Therefore while it would be unreasonable to expect respondents in a mail survey to rank a number of destinations on 119 labels, the resultant super-ordinate constructs could be expected to represent the range of sub-ordinate constructs. In this way, it is suggested if a destination rated strongly or poorly on any given super-ordinate construct, an investigation of respective sub-ordinate constructs could point to potential explainers. Using a simple cut and paste process, the 119 themes were grouped into similar categories. The category criteria recommended by Guba (1978) was adopted, where categories should feature internal homogeneity and external heterogeneity. While Repertory Grid can eliminate observer bias (Stewart and Stewart, 1981), Honey (1979, p. 457) warned of danger in imposing order on raw data:

*This is truly dangerous because, remember, one of the strengths of the Repgrid is that it is a technique which collects uncontaminated data. If we now proceed to contaminate it by forcing items into categories for our convenience this is a serious distortion of the data.*

Two of Honey's (1979) suggestions were used to avoid these potential problems. Firstly, no preconceived ideas were held on the type or number of categories. The focus was on inductive analysis, which looks for patterns and themes to emerge from the data (Patton, 1990). Secondly, three co-researchers were engaged to independently sort the data, since different insights may be gained when other people look at a data set (Patton, 1990).

For qualitative data analysis Denzin (1978) proposed triangulation by multiple observers, data sources or theories. Co-researchers in Repertory Grid have also been utilised by Stewart and Stewart (1981). The three co-researchers held different strengths, as recommended by Miles and Huberman (1994):

- A tourism-marketing manager, who was formerly an RTO marketing manager, with an interest in the research results.
- A tourism PhD candidate, who was also a senior lecturer on a tourism degree programme, with an interest in qualitative research methods.
- A non-tourism PhD candidate, who was also managing director of a construction company, with an interest in qualitative research methods.

During January 2000 each co-researcher was provided with the list of 119 themes, and advised of Guba's (1978) category recommendations. The frequency count was not provided, as it was felt this might influence their categorisation. With the benefit of hindsight, the frequency count could have been included, since co-researchers may choose to "peel the onion of reality" differently and not be expected to produce exactly the same categories (Guba, 1978, p. 57). The co-researchers content analyses resulted in range of both similar and different construct categories, which could be used subjectively to either support or challenge those of the author. Following minor changes, 17 categories, as shown in Table 4.2, were then re-presented to the co-researchers. The co-researchers verified this categorisation.

One further category was considered, which was 'relaxing'. This included statements such as 'safe', 'relaxing', 'no traffic congestion', 'able to wear anything', 'everything within walking distance', 'easy to get around', 'no traffic congestion', 'not sophisticated' and 'able to be anonymous'. Collectively, these statements were mentioned by 20 participants. It was felt that 'relaxing' represented an affective dimension, which could be included in an affective response grid, as presented in Chapter 2, rather than as a cognitive scale item.

**Table 4.2 Construct Categories**

<b>Construct Category</b>	<b>Number of participants</b>	<b>% of participants</b>
1. Lots to do/see	25	100%
2. Within a comfortable drive	23	92%
3. The Sea/Beaches	23	92%
4. Swimming/boating	21	84%
5. Good weather	21	84%
6. Not too touristy	21	84%
7. Natural scenery	20	80%
8. Fishing	19	76%
9. Close to other destinations	17	68%
10. Walking tracks	16	64%
11. Snow sports	16	64%
12. Adventure activities	13	52%
13. Friendly locals	12	48%
14. Wineries	11	44%
15. Suitable accommodation	11	44%
16. Shopping	9	36%
17. Cafes/restaurants	9	36%

## **Practitioner Opinion**

While the view of the consumer was of paramount importance to the thesis, the supply-side perspective of attribute importance was also of interest. It was felt that this perspective might provide a form of triangulation, when aligned with the literature review and Repertory Grid analysis. A series of personal interviews, with a purposeful sample of 11 practitioners, was held during the period September 27<sup>th</sup> to December 6<sup>th</sup> 1999. The sample involved RTO representatives and private sector operators from five regions:

### **Rotorua**

- Bruce Thomassen, Tourism Rotorua marketing manager.
- Grant Delamore, Tourism Rotorua VIN manager and VIN NZ director.
- Mike Gibbons, Tamaki Maori Village CEO.
- Trish May, Rainbow – Essentially New Zealand marketing manager.
- Paul Greaves, Quality Hotel general manager, Rotorua Hotel General Managers' Group chairman, former MV Lakeland Queen general manager and director of Rotorua 5-Star Attractions.

### **Tauranga/Mount Maunganui**

- Doug Burton, Tourism Bay of Plenty CEO.
- Julie Kerry, lodge owner and polytechnic tourism programme leader.

### **Taupo**

- Paul Yeo, Destination Lake Taupo marketing manager.
- Jim Little, former Destination Lake Taupo marketing manager.

### **Coromandel**

- Jim Archibald, Tourism Coromandel CEO.

### **Northland**

- Chris Jacobs, Fullers Northland and Destination Northland director.

A standardised open-ended interview approach was utilised. In asking the same questions of respondents, interviewer effects are minimised, data analysis is easier through cross case analysis, and time management is better focused (Patton, 1990). A prefatory statement was used at the time of setting up each appointment, and again at the outset of the interviews. With the purpose of determining what destination attributes were considered important by industry, each interview was initiated with the following questions:

*Which destinations are considered to be the main competitors to your region for the Auckland self drive short break market? Why?*

*What do you consider to be the most important attributes sought by Aucklanders in the choice of a short break self-drive holiday destination?*

There were no observable difficulties in discussing the issue. However, there was a tendency to discuss the particular strengths of their own region, rather than attributes that differentiate destinations. Interviews lasted up to one hour, and were recorded and transcribed. Analysis of the interview transcripts consisted of classifying and counting the elicited destination attribute themes. The complete list was reduced to 15 categories:

1. Tourist infrastructure (mentioned by 10 out of 11 practitioners)
2. Location (9)
3. Bachs (8)
4. Sport and recreation (8)
5. Lots to do (7)
6. Price/value (7)
7. Events (7)
8. Beach (6)
9. Water activities (5)
10. Shopping (5)
11. Getting away from it all (5)
12. Culture (5)
13. Nature (3)
14. Weather (3)
15. Hot pools/spas (3)

## Destination Image Literature

A review of 84 published destination image papers, from the period 1973-2000, was undertaken. Of these, 67 papers (80 per cent) used lists of attributes in structured questionnaires. Alternative qualitative methods of destination image analysis included: cognitive mapping (Fridgen 1987, Walmsley and Jenkins 1992), sketch maps (Pearce, 1977), constant sum (Woodside and Carr, 1988), free association (Reilly, 1990), open ended questions based on pictorial stimuli (Dann, 1996a), and personal interviews (Lawton and Page 1997, Lubbe 1998). Over 100 attribute themes were used in the 67 structured studies. These were categorised into 20 labels:

1. Nature/scenery (58 out of 67 studies)
2. Local culture (54)
3. Friendly locals (49)
4. Cost/value (43)
5. Climate (43)
6. Cuisine (43)
7. Lots to do/see (42)
8. Infrastructure (39)
9. Night life/entertainment (38)
10. Relaxing environment (37)
11. Getting there/getting around (37)
12. Shopping (37)
13. Accommodation (35)
14. History (33)
15. Safe environment (26)
16. Outdoor recreation (23)
17. Water sports (21)
18. The sea/beaches (21)
19. Sports activities (21)
20. Snow sports (13)

Crompton, Fakeye and Lue (1992) suggested the value of early destination image studies to practitioners was limited, due to the failure to recommend determinant attributes. Therefore, a further step was undertaken to analyse 39 of the 84 papers that had nominated determinant attributes or factors. Thirty-seven themes were identified and categorised into 15 labels:

1. Nature/scenery (26 out of 39 studies)
2. Local culture (21)
3. Cost/value (18)
4. Climate (18)
5. Infrastructure (17)
6. Friendly locals (16)
7. Lots to do (11)
8. Accommodation (11)
9. Relaxing environment (10)
10. Sport and recreation opportunities (9)
11. Cuisine (8)
12. History (7)
13. Nightlife (6)
14. Safe environment (6)
15. Accessibility (5)
16. Shopping (5)

Most of the 67 structured studies relied on the supply-side generation of attributes. Common methods of attribute selection were literature review, content analysis of brochures and practitioner interviews. Less than one-quarter of the studies involved consumers in their questionnaire development.

Hu and Ritchie (1993) noted that in previous destination image studies, two types of attributes had emerged – those universally important in the attractiveness of any destination, and those dependent on travel context. Since travel context is important, a selection of the most cited attributes from the overseas literature may not capture the essence of a New Zealand self drive short break holiday. Hu and

Ritchie found two attributes that were universally important, 'natural scenery' and 'climate'. Davis and Sternquist (1987) suggested the similarity of five determinant attributes from their study, with those of Goodrich (1977) and Ritchie and Zins (1978), offered promotional opportunities. If such themes were consistently proved important, campaigns could simply focus on these, which were: 'Availability of water sports', 'Scenic beauty', 'Opportunity for rest and relaxation', 'Suitable accommodations', and 'Pleasant attitudes of local people'. These attributes also featured in the Repertory Grid results.

In New Zealand, Cossens' (1989) masters' thesis found no research that had examined domestic holiday attributes. Cossens selected attributes from overseas studies and screened these through focus groups. Cossens' (1994) comparative study used the same attributes, but acknowledged the focus groups consisted of local students and academics. Driscoll and Lawson (1990) used a convenience sample to pre-test eighteen attributes from the literature. Kearsley, Coughlan and Ritchie (1998) used focus groups to supplement attributes found in the literature. Key attribute themes used in these studies, excluding Cossens (1989), were: 'local culture', 'cost/value', 'climate', 'nightlife', 'shopping', 'accessibility', 'sports and adventure activities' and 'nature/scenery'.

Table 4.3 compares attribute theme rankings from the Repertory Grid, practitioner opinion and literature review, where a number of similarities were evident. Seven attributes were common to both the Repertory Grid and the determinant literature, while seven attributes were common to Repertory Grid and practitioner opinion. Four attributes featured in all four sources: 'lots to do', 'good weather', 'nature/scenery' and 'shopping'. Also, differences between the Repertory Grid results and literature review highlighted the importance of the New Zealand short break holiday context. Six attributes, which featured in the Repertory Grid, did not feature strongly in the literature: 'Within a comfortable drive', 'Not too touristy', 'Fishing', 'Close to another destination', 'Walking tracks' and 'Wineries'. Differences between the Repertory Grid and practitioner opinion confirmed the importance of consumer input. Ten attributes, which featured in the Repertory Grid, did not feature in practitioner opinion. These differences in supply-side and

demand-side perspectives supported previous studies that found differences between practitioners and travellers, as discussed earlier (see McCullough 1977 cited in Stringer 1984, McLennan and Foushee 1983, Witter 1985). Fourthly, it was felt the Repertory Grid sample size was justified with the commonality of responses. The 13 verbal labels elicited from the first subject accounted for 134 of the total 567 statements (23.6 per cent). The redundancy of extra participants was evident when, after seven interviews, over 80 per cent of the total 567 labels had been elicited.

**Table 4.3 Comparison of Attribute Rankings**

	<b>Repertory Grid</b>	<b>Practitioner Opinion</b>	<b>Literature-Determinant</b>	<b>Literature - General</b>
Lots to do	1	5	8	8
Comfortable drive	2	2		
The sea/beach	3	8		17
Water sports	4	9		16
Good weather	5	14	4	6
Not too touristy	6			
Nature/scenery	7	13	1	1
Fishing	8			
Close to other destinations	9			
Walking tracks	10			
Snow sports	11			19
Adventure activities	12			15
Friendly locals	13		6	3
Wineries	14			
Accommodation	15		9	13
Shopping	16	10	15	12
Cafes/restaurants	17		11	7
Cost/value		6	3	5
Infrastructure		1	5	9
Sports activities		4	10	18
Safe/relaxing		11	7	4
Bachs (holiday homes)		3		
Events		7		
Hot pools/spas		15		
Local culture			2	2
Nightlife/entertainment			13	10
Access/getting around			14	11
History/historical sites			12	14

## The 20 Selected Attributes

The relatively low ranking of price/value as a differentiating factor in the Repertory Grid results may be surprising, considering the view presented in Chapter 3 that domestic travel in New Zealand had been perceived as expensive. This may have been related to the travel context, with little perceived difference between the cost of destinations close to Auckland. Given the importance of this attribute in the practitioner interviews and the literature it was felt this warranted inclusion.

The recurring promotional themes used by Rotorua, identified in Chapter 3, were considered. Spa bathing for recreation and health featured strongly. With the recent renaissance in spa tourism in Rotorua it was felt this attribute warranted inclusion, even though the word 'spa' was not elicited from any Repertory Grid participants. Therefore 'Hot pool bathing' was selected. It is acknowledged this was mentioned by only three of the practitioners, three Repertory Grid participants, and was not a feature in the literature. Maori culture was not a strong theme in the Repertory Grid interviews, with only four participants mentioning the attribute. However, the significance of this attribute in Tourism Rotorua's strategic plan, justified its inclusion. The final 20 attributes selected are presented in Table 4.4.

It was felt geothermal attractions would be implicit in 'lots to see and do', as would the range of attractions and facilities. Lakes would be implicit in 'Places for swimming/boating'. The 'Tourist Diamond' theme, along with 'Fascinating Rotorua Radius' would be implicit in 'Close to other holiday destinations'. Finally, it was felt that negative publicity relating to crime and commercialism would be implicit in 'not too touristy' and 'friendly locals'.

'Suitable accommodation' sub-sumes bachs and private accommodation. This was an important consideration given the importance of VFR motivation and the research in the UK which suggested the most popular form of short break accommodation was with friends and relatives (see Mintel, 1994). In the

Coromandel, for example, there are an estimated 8,000 holiday homes (Jim Archibald, personal communication, December 1999). Also, approximately one third of all Taupo homes are owned by absentee landlords, and therefore either investment holiday homes or rental properties (Paul Yeo, personal communication, November 1999). In Rotorua it has been estimated 200,000 visitor nights were generated through holiday homes, of which over 50 per cent were attributed to Aucklanders (APR, 1995b). In general, practitioners viewed the bach as a holiday tradition. However the use of bachs may not be as prevalent for short breaks. In 1999 only 8 per cent of New Zealand domestic travel involving at least one night away used bachs (Forsythe Research, 2000).

**Table 4.4 The 20 Selected Attributes**

1	A comfortable drive from home
2	Good weather
3	Lots to see and do
4	A place that is not too "touristy"
5	Good ocean beaches
6	Natural scenic beauty
7	Places for swimming or boating
8	Fishing
9	Close to other holiday destinations
10	Places for walking/tramping
11	Snow sports
12	Friendly locals
13	Shopping
14	Adventure activities
15	Hot pool bathing
16	Good cafes/restaurants
17	Suitable accommodation
18	Maori culture experiences
19	Good value for money
20	Wineries

## **Stage 2 - Identification of Destination Positions**

This section discusses two of the methods used to identify the positions of the competitive set of destinations. Firstly, Importance-Performance Analysis is presented as a technique with the potential to both operationalise 'destination attractiveness' and also be readily communicable to practitioners. Secondly, the more commonly used multidimensional scaling procedure is discussed. The background to the third technique, Affective Response Matrix, was provided in Chapter 2.

### **Importance-Performance Analysis (IPA)**

Understanding how well a destination's features perform is not sufficient to determine positioning, if they are not evaluated in terms of importance to the traveller. Satisfaction results from expectations about important attributes and the perceived performance of those attributes (Myers and Alpert 1968, Swan and Combs 1976). Destination attractiveness consists therefore, not only of the beliefs about the place, but also the importance of this belief: "It may be found that tourists rate an area as being very attractive, but still do not visit it because it is attractive on the basis of criteria that are unimportant to them" (Ryan, 1991a, p. 55). In destination image studies Crompton (1979b) claimed the first use of evaluative scales. Crompton's results highlighted the dilemma for Mexico, where the best performing attributes were those respondents did not deem important. Similarly, Uysal, Chen and Williams (2000) found Virginia's strengths were known to respondents, but actually unimportant to them.

Importance-Performance Analysis (IPA), introduced to the marketing literature by Martilla and James (1977), considers both the importance of product attributes to the individual as well as the perceived product performance on those attributes. In IPA, importance and performance are analysed separately, rather than summed as in the Fishbein (1967) model. This is important since two summed scores could represent either high importance/low performance or low importance/high performance (Ennew, Reed and Binks 1993).

IPA's versatility has been demonstrated in a range of applications, including the evaluation of: breakfast food brands (Sethna, 1982), national competitiveness (Leong and Tan, 1992), therapeutic recreation services (Kennedy, 1986), communication effectiveness (Richardson, 1987), a new sports complex (Bartlett and Einart 1992), dental practices (Nitse and Bush, 1993), employee satisfaction (Graf, Hemmasi and Nielsen 1992, Havitz, Twynam and DeLorenzo, 1991, Novatorov 1997, Williams and Neal 1993), banking (Ennew, Reed and Binks, 1993), operations improvement priorities (Slack, 1994), and business schools (Ford, Joseph and Joseph, 1999). An example of the practical use of IPA was Guadangalo's (1985) use of the method to evaluate a 10 kilometre running race over three consecutive years. Recommendations from the first year's study were implemented, and then tracked for improved performance in the following year.

The visual interpretation of the IPA matrix lends itself to practitioners who may not have well developed research skills. The greatest strength of the IPA is its suitability for enabling managerial decision-making due to the simplicity and power of the matrix (Evans and Chon 1989, Martilla and James 1977, Sethna 1982). As shown in Figure 4.1, the matrix introduced by Martilla and James (1977) represents two dimensions and four quadrants. The Y-axis plots respondents' importance of the attributes, while the X-axis highlights the perceived product performance on the same attributes. Martilla and James (1977) labelled the four quadrants with practitioners in mind:

### **Concentrate Here**

Quadrant 1 features attributes rated most important, but where the product is not perceived to perform strongly. This signals a need for remedial action to improve perceived performance, hence the need to 'concentrate here'.

### **Keep up the Good Work**

Quadrant 2 features attributes rated important, and where the product is perceived to perform strongly. Therefore, these should be reinforced in promotional activity.

### Low Priority

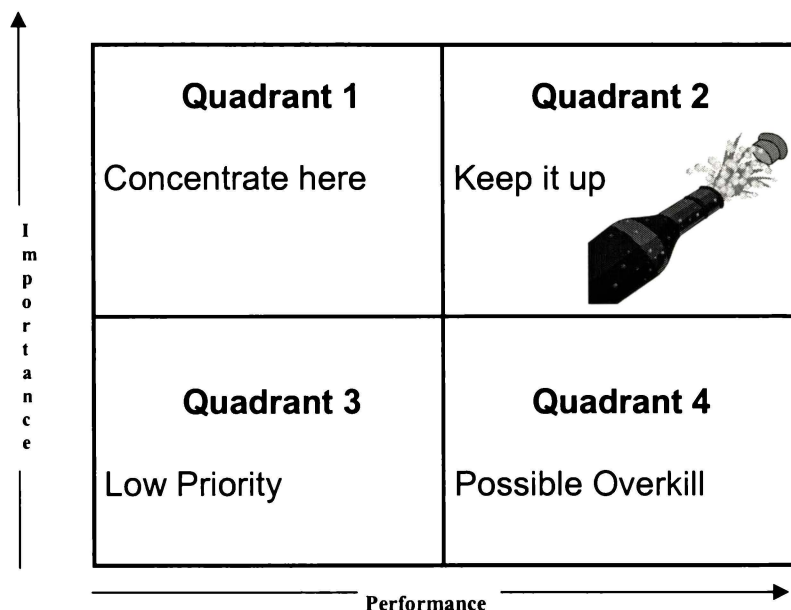
Quadrant 3 features attributes rated less important, and where product performance is perceived to be low. These have a lower priority in promotions.

### Possible Overkill

Quadrant 4 features attributes rated less important, and where the product is perceived to perform strongly. These should have less influence in promotions.

The quadrants have also been labelled: 'Missed opportunities', 'Strengths', 'Who cares', and 'Wasted effort' (Chon, Weaver and Kim, 1991). Yu and Weiler (2000) referred to Quadrant 4 as 'Unappreciated performance'.

Figure 4.1 IPA Matrix



Source: Martilla and James (1977)

IPA effectiveness relies on the visual interpretation of the matrix, which is dependent upon the placement of the axes. Martilla and James (1977) recommended the IPA value was identifying relative measures of performance, rather than absolute measures. For instance, if qualitative research has been successful in identifying salient attributes, the attributes in Quadrants 3 and 4 may still be important. The X-axis cross-hair placement may then be subjectively

placed in the attempt to identify a smaller sub-set of determinant attributes. Researchers have recommended dividing the axes by one of four techniques: the scale mid-point, one unit above the scale mid-point, the grand mean, and the median. The issue of skew will usually necessitate not using the scale mid-point. For example, if attributes have been selected on the basis of their salience it would be expected that results would be positively skewed. Attributes may all be positioned in Quadrant 2. Adaptations in previous IPA studies' are highlighted in Table 4.5.

**Table 4.5 Comparison of IPA Axes Placement Methods**

Scale mid-point	One unit above scale mid-point	Grand mean	Other
Evans and Chon (1989)	Martilla and James (1977)	Graf, Hemmasi and Nielsen (1992)	Uysal, Howard and Jamrozy (1991)
Havitz, Twynam and DeLorenzo (1991)	Crompton and Duray (1985)	Hollenhorst, Olson and Fortney (1992)	Leong and Tan (1992)
Williams and Neal (1993)	Guadangolo (1985) Kennedy (1986)	Saleh and Ryan (1992)	Martin (1995)
Chapman (1993)	Mengak, Dottavio and O'Leary (1986)	Nitse and Bush (1993)	Vaske, Beaman, Stanley and Greiner (1996)
	Chon, Weaver and Kim (1991)	Keyt, Yavas and Riecken (1994)	Go and Zhang (1997)
	Bartlett and Einart (1992)	Oppermann (1996b)	Hudson and Shephard (1998)
	Novatorov (1997)	Chu and Choi (2000)	

Given the potential value of the technique, it might be thought there would be more use of IPA in the tourism literature. Applications have included evaluation of: a visitor centre (Mengak, Dottavio and O'Leary, 1986), state park cabin accommodation (Hollenhorst, Olson and Fortney (1992), ski resorts (Hudson and Shephard 1998, Uysal, Howard and Jamrozy 1991), restaurants (Keyt, Yavas and Riecken 1994), hotels (Chu and Choi 2000, Martin 1995), pre and post tour satisfaction gaps (Duke and Persia, 1996), the use of a simulated data set to develop a tourist behaviour model (Vaske, Beaman, Stanley and Grenier, 1996), and perceptions of wineries (O'Neill and Charters, 2000).

IPA was first applied in destination image research by Crompton and Duray (1985), in an analysis of the image of Texas. This has been followed by studies of the perceptions of a mountain destination (Evans and Chon, 1989), Norfolk, Virginia as a short break destination (Chon, Weaver and Kim, 1991), Western Australia (Pritchard, 1997), Romania (Kozak and Nield 1998) convention destinations (Go and Zhang 1997, Oppermann 1996b), ski resorts (Hudson and Shephard, 1998), and Virginia (Uysal, Chen and Williams, 2000). While IPA had the potential to address Mayo and Jarvis' (1981) conceptualisation of destination attractiveness, the technique's ability as a destination-positioning tool has not been fully demonstrated. Positioning studies require a frame of reference with competitors, and there has been limited use of IPA in multiple destination images studies. Only three such studies were sourced:

- Weber and Mikacic (1995) compared images of six counties in Croatia.
- Oppermann (1996b) compared perceptions of 30 North American convention destinations, but limited the IPA matrix to three destinations.
- Kozak and Nield (1998) compared satisfaction at three Black Sea regions.

Therefore it was felt important that the data generated from the survey instrument could also be used in the more common multi-dimensional scaling analysis. The intent was to develop a perceptual map that would provide a comparison with the IPA results. The literature review found that perceptual mapping had been reported in 21 of 142 published destination image papers reviewed.

## **Multi-dimensional Scaling (MDS)**

The structure of an IPA also enables a MDS analysis of the data. It was felt the more traditional MDS technique would provide a useful comparison to the output generated from IPA. The use of MDS in the marketing field began in earnest during the 1960s and 1970s (see for example Green and Carmone 1969, Ritchie 1975, Wind and Robinson 1972), when the introduction of statistical computer packages enabled the complex analyses. MDS is similar to factor analysis in that

it is a technique for reducing voluminous data, but is also able to identify any underlying structure within the data, in the form of a perceptual map. In a perceptual map the closer two points are to each other the greater the similarity. The further away they are the more dissimilar they are perceived. Kruskal and Wish (1978, p.7) provided a useful description of MDS rationale:

*Suppose you are given a map showing the locations of several cities in the United States, and are asked to construct a table of distances between these cities. It is a simple matter to fill in any entry in the table by measuring the distance between the cities with a ruler, and converting the ruler distance into the real distance by using the scale of the map (eg., one cm. = 30 kilometers).*

*Now consider the reverse problem, where you are given the table of distances between the cities, and are asked to produce the map. Geometric procedures are available for this purpose, but considerably more effort would be required. In essence, multidimensional scaling, or MDS, is a method for solving this reverse problem.*

MDS is able to analyse either similarity or dissimilarity data. Similarity data is obtained from respondents' direct comparisons of brands, through, for example, pairwise comparisons. Dissimilarity data is derived from other data such as rating scales, through indirect comparisons of brands.

The first destination positioning applications of MDS were reported in conference papers by Anderssen and Colberg (1973) and Mayo (1973). The first MDS destination positioning study published in the tourism literature was by Goodrich (1977, 1978b). Since these early works the technique has been used in a number of destination positioning studies (See for example Baloglu and Brinberg 1997, Cossens 1994, Dillon, Domzal and Madden 1986, Dolnicar, Grabler and Mazanec 1999b, Driscoll and Lawson 1990, Gartner 1989, Grabler 1997a, Haahti 1986, Mackay and Fesenmaier 2000, Manrai and Manrai 1993, Murphy 1999, Shoemaker 2000, Yau and Chan 1990). For a discussion on a wider range of tourism applications of MDS the reader is referred to Fenton and Pearce (1988).

## **Questionnaire Design and Implementation**

There are generally five steps involved in IPA: selection of attributes, selection of competitive destinations, selection of the sample, survey administration, and matrix construction and analysis. The first two steps were addressed earlier in the chapter. This section addresses steps three and four.

### **Sample Frame**

One of the pitfalls with IPA is only surveying current customers, which will achieve a one-sided view (Chapman, 1993). A number of destination image studies have interviewed travellers during their stay at a destination, and have acknowledged two important limitations of this approach (see Witter 1985, Yau and Chan 1990). First, opinions are sought from visitors and exclude those who have chosen not to visit. Secondly, since the respondents have already chosen to visit the destination of interest, they may be biased toward the more positive attributes of that destination. The thesis is therefore interested in a random sample selection that would capture previous visitors to Rotorua as well as non-visitors. The target population is residents of the Auckland region. Ideally, the sample design would target those Aucklanders with a propensity towards short break holidays. However, since no previous research has identified these characteristics, it was decided to include the wider Auckland population in the sample frame.

Auckland Regional Council (1999) provided a summary of the geo-demographic characteristics of the region, which extends from Wellsford in the north to Pukekohe in the south. As at June 1998, the Auckland region's resident population was estimated to be 1,159,400, which represented approximately 31 per cent of New Zealand's total population. This estimate was consistent with the 1996 census, which recorded a resident population of 1,068,645 (Statistics New Zealand, 1997). Auckland has been the largest city in New Zealand since 1886, and recently surpassed Adelaide to become Australasia's fifth largest (Auckland Regional Council, 1999). Auckland had 356,648 household dwellings in 1998. The

region had 565,593 private vehicles, which represented an average of 1.6 per household, slightly higher than the New Zealand average of 1.5.

## **Sample Design**

Dillman's (1978) total design mail survey method, which has achieved response rates of 75 per cent, was considered. However, due to limited financial resources it was decided to use a one-shot mail-out of 3000 questionnaires, rather than a series of smaller mail-outs and reminder cards. Of importance is the number of useable responses rather than the actual response rate, providing the sample is representative. In this way a lower than average response rate of 20 per cent could still yield a respectable return of 600 responses. Malhotra, Hall, Shaw, and Chrisp (1996) supported this approach, citing research by the Department of Employment, Education and Training in Australia, which received 563 useable responses from a mail-out of 3000 questionnaires.

A systematic random probability sample of 3000 households was selected from the 1999 Auckland telephone directory (Telecom, 1999). This approach has also been used in other destination studies (see Cossens 1994, Driscoll and Lawson 1990, Hu and Ritchie 1993, Hunt 1975, Lee 2000, Matejka 1973, Yannopoulos and Rotenberg 1999). Of the total number of Auckland households, approximately 323,379 (91 per cent) have a landline telephone connection (Auckland Regional Council, 1999). There are approximately 300,000 published residential listings in the 1999 Auckland directory, plus or minus three per cent (Sally Bazely, New Zealand Directories Ltd, Personal communication, 23/9/99). This gave the sample frame coverage of 84.4 per cent of all homes, or 92.8 per cent of households with landline telephones.

Every residential listing had a 1 per cent probability of selection. The starting point was generated by using the RAND formula in Microsoft Excel 97, as outlined by Gips (1997): =INT(N\*RAND()+L, where N is the number of integers in the range and L is the lowest integer. The listings in the 1999 Auckland white pages ranged from page 76 to page 1568. The formula =INT(1493\*RAND()+76 identified page number 257. This page contained four columns of listings. To generate a random

column on page 257 the formula =INT(4\*RAND()+1 generated column two. Column two contained 58 listings. To generate a random listing from the column the formula +INT(58\*RAND()+1 generated listing number 11. This was then used as the first sample unit. From this point every 100<sup>th</sup> residential listing was selected. If a 100<sup>th</sup> listing was a non-residential entity such as a business, charity, sporting club or other organisation, the next residential listing after the organisation was selected. The count recommenced from this point. Envelopes were addressed to the name(s) as listed in the directory.

## **Questionnaire Design**

Questionnaire development has been one of the most difficult and neglected aspects of the research process (Jacoby, 1978). One of the reasons is that the process is more an art than an exact science (Malhotra et al., 1996). In particular it is difficult to design a questionnaire that is appropriate for a diverse population, such as the thesis' sample frame. Therefore, care was taken to ensure the wording was simple, efficient and understandable, as recommended in the literature (see Dillman 1978, Likert 1967, Malhotra et al. 1996). Two pre-tests of the draft questionnaire proved useful in this regard.

Pre-tests help to determine how well a questionnaire works (Hunt, Sparkman and Wilcox 1982, Likert 1967, Oppenheim 1966). Due to the lengthy nature of IPA, pretesting is prudent. The observation of respondents completing a pre-test questionnaire has also been recommended (Dillman 1978, Hunt, Sparkman and Wilcox 1982). This initial step was undertaken with two subjects, and resulted in minor alterations to the draft questionnaire, before the first pre-test questionnaire was distributed.

Although Oppenheim (1966) recommended 50 as a suitable size for a pilot test, sizes of pre-test samples in previous studies have generally been small, ranging from 12 to 30 (Hunt, Sparkman and Wilcox 1982, Malhotra et al. 1996). It has also been suggested that the pre-test should use respondents whose characteristics are similar to those in the main survey (Malhotra et al., 1996). However, due to limited resources the pre-test was not undertaken in Auckland. Instead, a small

convenience sample of the Rotorua population was used, comprising a mix of academic staff from Waiariki Institute of Technology (n = 50), and members of the business community (n = 10). The questionnaire was distributed during April 2000.

It was felt that since the purpose of the pre-test was to determine how well the questionnaire worked, the Rotorua sample was adequate. The pre-test questionnaire was adapted to include destinations more likely to be appropriate to a Rotorua population, when considering short break holidays: Auckland, Napier, Taupo, Mt Maunganui/Tauranga and Coromandel. Pre-test respondents were requested to return the questionnaires anonymously, and also encouraged to supply comments separately regarding the following:

- The length of time taken to complete the questionnaire
- Any ambiguous questions
- Any spelling or grammatical errors
- Any general comments about the nature of the questions

A total of 33 completed questionnaires were returned. Respondents averaged 16 minutes to complete the questionnaire. Some commented that the questionnaire was long, but that the repetitive nature of the scales made the exercise manageable for them. Suggestions concerning wording and presentation were adopted in the development of the second pre-test questionnaire. A convenience sample of Rotorua residents was used (n = 7).

The final questionnaire design used a variation of the booklet form recommended by Dillman (1978). The questionnaire was printed on two sides of A3 paper and folded into a 12-page A4 booklet. The front cover featured an introduction letter, using the letterhead of the research sponsor, Waiariki Institute of Technology. The cover letter introduced the purpose of the research and provided a definition of a short break holiday. Also, the cover advised potential respondents it would take approximately 15 minutes to complete. It was felt this would be an important reassurance given the likely first impressions of the size of the instrument. The

booklet contained a total of 165 response items. Appendix C is a copy of the questionnaire.

There is no fixed rule regarding the relationship between questionnaire size and response rate (Dillman 1978, Oppenheim 1966). Oppenheim suggested people will fill in lengthy questionnaires if they have an interest in the topic. It is important that the questionnaire looks attractive to the respondent, and as least like a tax return as possible. Dillman reported no significant differences in response rates for questionnaires of up to 125 items. In line with the IPA method requirements, the questionnaire was divided into two sections. Respondents were requested to complete section A before reading and completing section B.

### **Section A**

Section A contained a mix of open-ended questions, motivation scales and attribute importance scales. Care was taken in the design of the presentation order of questions. Oppenheim (1966) suggested starting with broad easy questions and funnelling into those with a narrower focus. This is particularly useful when seeking information on general choice behaviour prior to specific brand evaluations (Malhotra et al., 1996).

#### **Question 1 – Likelihood of taking a domestic short break by car**

The first question should be interesting and easy enough for all respondents to consider in only a few seconds, and therefore not open-ended (Dillman, 1978). The question sought the likelihood of taking a short break by car during the next twelve months. The purpose was to establish the popularity of self-drive domestic short breaks. A seven-point scale was used, following Fishbein and Ajzen's (1975) suggestion that individuals could place themselves along a continuum of intent. One of the key advantages of the Likert scale (Likert, 1932) is the ease in which respondents understand how to complete it, which makes it suitable for mail surveys (Malhotra et al., 1996). The scale was anchored at 'Definitely not' (1) and 'Definitely' (7).

## **Question 2 – Maximum Comfortable Driving Time**

This was a simple open-ended question to identify the limits of comfortable driving time to a short break destination. Distance to a destination was considered likely to be an important consideration for most travellers, particularly for short breaks. In New Zealand an estimated 81 per cent of domestic travel is by private car/van (Forsyte Research, 2000).

## **Question 3 – Frequency of Short Breaks**

To identify the number of short breaks taken each year, a simple open-ended question was used.

## **Question 4 – Motivation for a Short Break**

Since no scale for New Zealand domestic travel motivation was sourced, 11 motivation items were selected from the literature:

1. To visit friends or relatives.
2. For a break from routine.
3. For relaxation.
4. To attend an event.
5. Spend time with my children.
6. For excitement/action.
7. To meet new people.
8. For romance.
9. To explore/learn new things.
10. See places my friends haven't.
11. To educate my children.

It is felt these items also cover the New Zealand travellers' lifestyle segments of Lawson, Thyne and Young (1997), which are listed in Chapter 2. To measure the importance of the motivation items, a four-point scale was used, following overseas studies by Baloglu and McCleary (1999a) and Moscardo et al. 1996). The scale was anchored at 'Not important' (1) and 'Very important' (4).

### **Question 5 – Unaided ToMA**

An open-ended question was used to identify the destination that was top of mind to the respondent, in the travel context. Fishbein and Ajzen (1975) proposed any question exploring of the relationship between attitude and behaviour must include the following:

- The *behaviour*, which for the thesis is a holiday.
- The *target object* at which the behaviour is directed, which are domestic destinations in New Zealand.
- The *situation* in which the behaviour is to be performed, which is a self-drive short break.
- The *time* at which the behaviour is to be performed, which is within the next 12 months.

All four points were carefully included in Question 5. It was noted that Woodside and Carr (1988), following Wilson (1981), prompted their respondents to mention at least three destinations. Such a prompt was not used in this case, to avoid limiting respondents' thinking.

### **Question 6 – Decision Set**

An open-ended question was used to identify the range of other destinations that would probably be considered for a short break. The responses would be considered the decision set. This bypassed the available set, which could have been operationalised by asking respondents to list all the possible destinations available to them. This set also provides an effective indicator of which brands are similarly positioned (Wilson, 1981).

### **Question 7 – Attribute Importance**

This question required rating the 20 cognitive attributes. Respondents were asked to rate the importance of each attribute, in the context of short break holiday destination selection, using a seven-point scale. Reliability of scales increases with the number of steps, levelling off at seven steps (Nunnally, 1967). Destination

studies have used a range of scales, from three-point (McLennan and Foushee 1983, Riley and Palmer 1975) to eleven-point (Ritchie and Zins, 1978). The most prevalent have been five-point and seven-point scales. Ryan (1995) suggested this was due to a tendency for respondents to use middle scores rather than commit to extreme values. This has been referred to as the error of central tendency (Oppenheim, 1966). Oppenheim suggested making the extreme points sound less extreme. Therefore the scale was anchored at 'Of no importance' (1) and 'Very important' (7). Also, the mid-point number four was labelled 'Moderately important', following Kennedy (1986).

## **Section B**

It is important to have a clear division in the IPA questionnaire design, between sections A and B, to minimise potential compounding effects (Martilla and James, 1977). In order to provide a clear separation, the introduction page to Section B did not contain any questions. Respondents were directed to complete Section A before reading and completing Section B. Following Grabler (1997a), respondents were also advised that it did not matter if they had not visited a particular destination since it was their perceptions that were of interest.

### **Question 8 – Bay of Islands' Performance**

A seven-point scale was provided to rate the perceived performance of the Bay of Islands across the same 20 attributes used in Section A. Respondents were asked to indicate their level of agreement that the destination possessed each attribute. The scales were anchored at 'Very strongly disagree' (1) and 'Very strongly agree' (7).

### **Questions 9 and 10 – Affect Towards Bay of Islands**

To enable an Affective Response Matrix, two seven-point semantic differential scales were used to measure affect towards the Bay of Islands. The first was anchored 'Sleepy' (1) and 'Arousing' (7), and the second anchored at 'Unpleasant' (1) and 'Pleasant' (7).

### **Question 11 – Previous Bay of Islands Visitation**

This question was included to identify whether the respondent had previously visited the Bay of Islands, to enable analysis of perceptual differences.

### **Question 12 – Conation/Intent**

A seven-point scale was used to establish a measure of intent to visit the Bay of Islands for a short break during the following 12 months. Belk (1974) found intent was associated with behaviour when context and time were included. The scale was anchored at 'Definitely not' (1) and 'Definitely' (7).

### **Questions 13-17 – Coromandel**

This section used the same questions as 8-12, for Coromandel.

### **Questions 18-22 – Mt Maunganui**

This section used the same questions as 8-12, for Mount Maunganui.

### **Questions 23-27 – Rotorua**

This section used the same questions as 8-12, for Rotorua.

### **Questions 28-32 – Taupo**

This section used the same questions as 8-12, for Taupo.

### **Questions 33-40 Geo-demographics**

This section was placed near the end of the questionnaire (see Dillman 1978, Malhotra et al.1996, Oppenheim 1966). Characteristics sought were: age, gender, residential location, household income, marital status, number of dependent children, highest level of education, and whether respondents were born in New Zealand.

## **The Back Cover**

First impressions of the back cover were also considered. As recommended by Dillman (1978), there were no personal questions on the back cover. The back page featured only a blank space for any additional comments the respondent may wish to make about short breaks.

## **'0' Non-Response Option**

An important consideration in the questionnaire design was what to offer respondents who may not know, or indeed care, about a particular scale item. Chapman (1993) recommended that where IPA respondents are being asked to rate the performance of a brand that has not been evoked voluntarily, options should be provided for those with no opinion. Chapman cited the case of an MBA program survey that found one university rated 14th best in the USA when in fact they did not offer such a program. Hollenhorst, Olson and Fortney (1992) also provided a 'don't know' option in their IPA.

A respondent's mid-point score in a seven-point scale may be viewed as either a 'don't know', or just enough for the brand to be viewed as satisfactory (Howard and Sheth, 1969). One way to refine this potential for multiple meaning is to offer an explicit 'don't know' category. This was operationalised by using a 0 score, following Ryan and Garland (1999) who suggested that most studies using Likert type scales have not provided a non-response option. They argued that such an option is important for respondents when they don't hold an opinion or knowledge of an aspect of a place. Otherwise respondents might use a mid-point on the scale for neutrality. Their study found that as many as 20 per cent of respondents may use the non-response for difficult questions. They therefore suggested patterns of non-response might provide useful information for researchers. There has been little published in the tourism literature and yet non-response may be a potential source of bias. The '0' option was included in the motivation, attribute importance and destination performance questions. Also, the option was spaced away from the scale continuum to avoid it being misconstrued as a 0 - 7 rating scale.

## Questionnaire Distribution

In case the questionnaire might appear imposing, it was decided to mail 1600 of the 3000 intended questionnaires first to test the response, before printing and distributing the remainder. If the response rate from the first batch was too low, reducing the number of destinations for evaluation could have shortened the remaining 1400 questionnaires. The first 1600 questionnaires were mailed 19-21 May, 2000. Recipients were advised to return the completed questionnaire, in the postage-paid reply envelope provided, by June 30<sup>th</sup> to be eligible for a prize draw. By May 26<sup>th</sup>, 181 (11.3 per cent) usable responses had been returned. This was regarded positively, and the remaining 1400 were printed. These were mailed 1-3 June, which coincided with the Queen's Birthday holiday weekend. The prize draw deadline was extended to 31 July for the second batch. The cover letter included a request for the questionnaire to be completed by the adult in the household, over the age of eighteen, who would next celebrate their birthday.

Chapman (1993) recommended offering some form of compensation to respondents due to the lengthy nature of IPA instruments. Incentives have also been used in other destination image studies (see Baloglu and McCleary 1999a, Cossens 1989, 1994b, Chon, Weaver and Kim 1991, Driscoll, Lawson and Niven 1994, Manrai and Manrai 1993, Shoemaker 2000). A two-night hotel package at a mystery location was offered as an incentive to respondents. The prize featured a four-star Rotorua hotel, but respondents were not advised of the location due to the potential for introducing bias. All respondents who completed and returned the questionnaire by the July 31<sup>st</sup> deadline were eligible. To enter, respondents were advised to complete a separate entry form, to be returned with the questionnaire. To ensure confidentiality, entry slips were immediately removed and separated from the returned questionnaires on receipt. The prize was drawn at Waiariki Institute of Technology on August 1st, and the winner was notified by phone and mail. The result was published in the NZ Herald on Saturday August 5<sup>th</sup>, 2000.

## Chapter Summary

Three techniques were used to identify attributes deemed salient to Aucklanders when considering a short break holiday by car. Repertory Grid Analysis was developed almost fifty years ago, but its application in destination image research has been rare. Use of technique identified 17 salient attributes. Another attribute, 'Hot pool bathing', was selected from personal interviews with industry practitioners, while 'Good value' was selected from the practitioner interviews and literature. 'Maori culture experiences' was included due to its prominence in Rotorua's product range and destination promotions. The 20 attributes selected represented the mid range of those used in 67 previous destination image studies, which ranged from one (Mayo, 1973) to 48 (Chen and Kersletter 1999, Uysal, Chen and Williams 2000). The mean number used in these studies was 19. A number of differences between the Repertory Grid findings and practitioner opinion confirmed the value of seeking consumer input when developing attribute lists. While both the Repertory Grid findings and practitioner opinion showed a general consistency with the range of 100<sup>+</sup> attributes used in the literature, key differences highlighted the importance of travel context.

The chapter outlined the design and implementation of a 165-item questionnaire to enable IPA, MDS and an Affective Response Matrix, as well as characteristics of domestic short break holidays, importance ratings of 20 cognitive attributes, performance ratings of five destinations, conation towards each destination, and respondent characteristics. Resources enabled a one shot mail out to 3000 Auckland households during the winter of 2000.

# Chapter 5 - Short Break Holiday Characteristics

The chapter discusses respondents' characteristics, reliability of response patterns, and results relating to Section A of the questionnaire.

## The Respondents

A total of 763 useable questionnaires were returned, representing a response rate of 25.4 per cent. Also, a further 56 non-useable questionnaires were received, comprising: 35 incorrect addresses, two deceased, two mischievous responses, 14 politely declining, and three received after data analysis was underway. Therefore the actual usable response rate (see Dillman, 1978) is 25.9 per cent. Interestingly, the two separate questionnaire mail-outs achieved similar response levels. The first mail-out of 1600 achieved a 25.7 per cent usable response, while the second mail-out of 1400 achieved a 26.1 per cent usable response. In both mail-outs the majority of responses were received within one week of each distribution.

The response level was compared with those achieved in fourteen previous multiple-destination image studies that utilised mail surveys. These are highlighted in Table 5.1. Five of these studies used pre-qualified subjects who had expressed some degree of interest in one of the destinations of interest. Given the thesis used a random selection of the general population, the response compared favourably. While the response rate for the thesis is towards the lower end of these studies, the sample size is larger than the mean and median. The sample size is considered adequate for the statistical analyses requirements of the thesis, in that it has been recommended there should be a minimum of 10 respondents per item used in an attitudinal questionnaire (Nunnally 1967, Ryan 1995). Others have suggested a minimum of five respondents per item (Coakes and Steed 1999, Tabachnick and Fidell 1996) and two respondents per item (Foster, 1998).

**Table 5.1 Response Rates For Multiple-Destination Image Studies**

	<b>Target Sample</b>	<b>Number of Usable Responses</b>	<b>% of Target Sample</b>
Hunt (1975)	4000	1262	31.5%
Goodrich (1978)**	900	230	26%
Gartner (1986)	3000	1004	43%
	3000	913	39%
Cossens (1989)	1800	809	45%
Cossens (1994b)	1800	665	37%
Driscoll and Lawson (1990)	3000	1230	41%
Chon, Weaver and Kim (1991)**	1029	401	39%
Ahmed (1991)	6000	1782	30%
Gartner and Shen (1992)**	470	299	64%
Manrai and Manrai (1993)	650	211	32.5%
Oppermann (1996b)**	600	123	20.5%
Kearsley, Coughlan and Ritchie (1998)	2000	320	16%
Baloglu and McCleary (1999)**	1530	448	29%
Lee (2000)	1008	458	48.5%
<b>Grand Mean</b>	<b>2052</b>	<b>677</b>	<b>32.98%</b>

\*\*Used pre-qualified subjects

Data were loaded into the Statistical Package for Social Sciences 10.0 (SPSS). Returned questionnaires were numbered and loaded in order of receipt. Missing responses were coded as 9. The SPSS frequencies function was used to identify any omitted variable cells and extreme scores. Loading errors were then rechecked against the numbered questionnaires.

## Reliability

Cronbach's (1951) alpha co-efficient was used to assess internal reliability of the motivation, attribute importance and destination performance scales. The alpha is a mandatory measure of a survey instrument's internal consistency (Churchill, 1979). The Cronbach alpha for the 11 motivation scales is .72, which is considered satisfactory since alphas above .70 indicate reliability (Ryan, 1995). The test also indicates no alpha improvement would result from the deletion of any individual motivation items. Guttman's split-half sample test produced an alpha of .68. Also, a split-half test produced an alpha of .50 for part one (6 items), and .68 for part two (5 items). The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy was used to determine the appropriateness of the motivation scales for factor analysis. Missing values were deleted pair-wise. The KMO for the motivation scales is .69. A KMO above .60 indicates suitability for factor analysis (Coakes and Steed, 1999).

The alpha for the attribute importance scales is .83. The test also indicates no alpha improvement would result from the deletion of any item. The combined alpha for attribute importance and destination performance is .96. An alpha above .80 may be regarded as good, and above .90 excellent (George and Mallery, 2000). Guttman's split-half sample test for the attribute importance items produced an alpha of .69. Also a split-half reliability test produced an alpha of .77 for part one 1 (10 items) and .74 for part two (10 items). The split-half alphas demonstrate how a deflated alpha may occur when the number of scales is reduced (George and Mallery, 2000). The KMO for the attribute importance scales is .83, which Kaiser would have regarded as 'meritorious', and therefore suitable for factor analysis (George and Mallery, 2000).

As discussed in Chapter 4, a '0' non-response option was provided in three sections of the questionnaire for respondents who may have been unsure about a particular scale item. The level of non-response varies between the three sections, but is higher for the motivation and destination performance items. This highlights the difficulty of measuring traveller motivation. Also, even though, as previously

indicated, there had been a high level of previous visitation to each destination, the higher non-response may be an indication that for some respondents, such visitation may not have been recent.

## **Sample Characteristics**

The potential for non-response bias is a disadvantage of mail surveys. This is because non-response is not a random process (Oppenheim, 1966). It has been argued that the lack of a non-response bias test has been a weakness of many tourism studies (Hunt, 1975). However, differences between respondents and non-respondents are not often able to be determined (Dillman, 1978). One option proposed by Dillman, and used in the thesis, was to compare the respondents' characteristics with those of the general population. In Hunt's study, respondents' characteristics were found to be similar to those of the general population. Hunt therefore suggested a non-response bias test would have been of questionable value. Ideally, the sample characteristics would have been compared to those of Auckland residents who have demonstrated a propensity for short break holidays. It might be expected the characteristics of such a group would differ from the general population in terms of income or available time. However, the characteristics of short break participants were not known in advance. Thus, geo-demographic characteristics of the sample were compared with those of the 1996 Auckland Census population (Statistics New Zealand, 1997). While the sample characteristics, highlighted in Table 5.2, are generally similar to the 1996 census population, minor differences are noted among the following: higher female/male ratio, higher level of 50-64 year olds, and lower level of 18-34 year olds, higher level from affluent suburbs, and lower level from low income areas, higher level of partnered relationships, higher education levels, and higher level of respondents born in New Zealand.

**Table 5.2 Sample Characteristics**

		<b>N</b>	<b>Valid %</b>
Gender	Male	350	45.9%
	Female	413	54.1%
	Total	763	
	Missing	0	
Age	18-25	25	3.3%
	26-34	118	15.5%
	35-49	297	38.9%
	50-64	233	30.5%
	65+	90	11.8%
	Total	763	
Residence	North of Auckland Harbour Bridge	242	31.7%
	South	521	68.3%
	Total	763	
	Missing	0	
Household income	< \$38,000	161	22.6%
	\$38,000-\$49,000	119	16.7%
	\$49,001-\$65,000	120	16.9%
	\$65,001-\$80,000	76	10.7%
	\$80,001-\$100,000	104	14.6%
	> \$100,000	131	18.4%
	Total	711	
	Missing	52	
Marital status	Single	83	11.0%
	Gay single	5	0.7%
	Married/De facto	562	74.3%
	Permanent same sex partner	21	2.8%
	Separated/divorced/widowed	85	11.2%
	Total	756	
Number of dependent children	0	425	55.8%
	1-2	260	34.2%
	3+	76	10.0%
	Total	761	
	Missing	2	
Highest level of education	High school	279	36.8%
	Polytechnic	156	20.6%
	University graduate	105	13.8%
	Professional qualification	152	20.0%
	Post-graduate	67	8.8%
	Total	759	
Place of birth	Born in New Zealand	573	75.2%
	Born overseas	189	24.8%
	Total	762	
	Missing	1	

The differences are similar to those experienced in previous New Zealand destination image studies. For example, Driscoll, Lawson and Niven (1994), who used the data set from Driscoll and Lawson (1990), found the sample profile to be older married professionals, with higher than average education and incomes than the general New Zealand population. Similarly, the sample of Kearsley, Coughlan

and Ritchie (1998) was biased toward older, better-educated respondents. The profile is also significant in that it is not too dissimilar from the characteristics of UK/Europe travellers with a propensity for short breaks (see Euromonitor 1987, Lohmann 1990, Middleton and O'Brien 1987, Ryan 1983). Therefore, it is felt that the sample characteristics would not damage the validity of the findings, in that they help to highlight the characteristics of those with a greater propensity for short breaks. Therefore a non-response bias test was not undertaken.

## **Short Break Holiday Characteristics**

The thesis is the first major investigation into domestic short break holidays in New Zealand. Of interest therefore is an exploration of characteristics of this type of holiday. Due to the lengthy nature of the IPA questionnaire requirements the characteristics of interest are limited to: likelihood of taking a short break within the next 12 months; maximum comfortable driving time to a short break destination; motivation for taking a short break; number of short breaks taken in a year; ToMA destinations; and, composition of decision sets.

### **Likelihood of a Short Break**

Respondents indicate a strong likelihood of taking a domestic short break holiday, by car, during the following 12 months. For this seven-point scale, anchored at 'Definitely not' (1) and 'Definitely' (7), the mean is 5.8. Table 5.3 shows almost 90 per cent of respondents indicate a likelihood higher than the scale mid-point. Only 73 respondents (9.7 per cent) score this item below the scale mid-point. A total of 301 respondents (40 per cent) indicate a definite intent to take a short break. Table 5.4 highlights the characteristics of those respondents who indicate definitely taking a short break. One-way ANOVA indicates significant differences, at the  $p < .001$  level, by age, income and education levels. Even taking into account these differences it is still evident that a significant proportion of all groups indicate a definite intent to taking a short break. In general the 40 per cent level is consistent across all groups.

**Table 5.3 Likelihood of taking a Short Break during the next 12 Months**

Scale	n	Valid %
1. Definitely not	1	0.1
2	38	5.1
3	34	4.5
4. Neither likely nor unlikely	28	3.7
5	140	18.6
6	210	27.9
7. Definitely	301	40.0
Total	752	100.0
Missing	11	

**Table 5.4 Characteristics of Respondents Indicating Definite Intent**

	Number of Respondents in each Group	Number of Respondents Indicating 7 as Intent	%
<b>AGE</b>			
18-25	24	10	41.7%
26-34	116	59	50.9%
35-49	295	117	39.7%
50-64	230	82	35.7%
65+	87	33	37.9%
<b>GENDER</b>			
Male	342	144	42.1%
Female	410	157	38.3%
<b>HARBOUR BRIDGE</b>			
North	234	85	36.3%
South	518	216	41.7%
<b>INCOME</b>			
<\$38,000	156	48	30.8%
\$38,000-\$49,000	116	49	42.2%
\$49,001-65,000	119	54	45.4%
\$65,001-\$80,000	76	35	46.1%
\$80,001-\$100,000	104	44	42.3%
>\$100,000	130	52	40.0%
<b>MARITAL</b>			
Single	82	36	43.9%
Gay single	5	2	40.0%
Permanent partner	552	218	39.5%
Same sex partner	21	9	42.9%
Separated/Widowed/Divorced	85	33	38.8%
<b>CHILDREN</b>			
0	418	174	41.6%
1-2	257	97	37.7%
3+	75	29	38.7%
<b>EDUCATION</b>			
High School	273	102	37.4%
Polytechnic	151	55	36.4%
University	105	48	45.7%
Professional	152	69	45.4%
Post-graduate	67	26	38.8%
<b>BORN</b>			
Born in NZ	568	227	40.0%
Born overseas	183	73	39.9%

## Maximum Comfortable Driving Time

The mean maximum comfortable driving time is 3.8 hours, which enables a geographic boundary of destinations. As shown in Table 5.5, 73.2 per cent of respondents indicate a maximum driving time of three or four hours. Only 57 respondents (7.6 per cent) indicate two hours or less, while 60 respondents (8.0 per cent) indicate six hours or more. Independent-sample t-tests and ANOVA of driving time indicate no significant differences between groups.

**Table 5.5 Maximum Comfortable Driving Time**

	n	%
Up to one hour	6	0.7
Two hours	51	6.9
Three hours	274	36.9
Four hours	270	36.3
Five hours	83	11.2
Six hours or more	60	8.0
Total	744	100.0
Missing	19	

## Motivation

Table 5.6 shows the mean scores for the motivation items. These are measured using a four-point scale, following previous studies, anchored at 'Not important' (1) and 'Important' (4). With the benefit of hindsight it would have been preferable to use seven-point scales, to provide more consistency for respondents and a more useful continuum to place their opinions. The highest rating motivators were: 'For relaxation', and 'For a break from routine'. These are consistent with the wider holiday motivation literature, and Plog's (2000) suggestion that holiday travel has become a psychological necessity. The implication is that the New Zealand short break travel context might not be a significant moderating variable. Also, for 402 respondents (53 per cent), 'Spend time with my children' is rated highly. Only three motivation items receive a mean rating below the scale mid-point of 2.5.

**Table 5.6 Motivation**

	<b>Rank</b>	<b>Mean</b>	<b>Std.</b>	<b>n</b>
For relaxation	1	3.4	.80	728
Spend time with my children	2	3.3	.96	402
For a break from routine	3	3.3	.87	727
To visit friends and relatives	4	2.9	1.06	653
To educate my children	5	2.8	1.04	395
To explore/learn new things	6	2.6	.98	662
For romance	7	2.5	1.08	548
To attend an event	8	2.5	1.01	673
For excitement/action	9	2.2	1.05	637
See places my friends haven't	10	1.7	.97	568
To meet new people	11	1.6	.81	604

As indicated, the KMO score indicates the motivation results are suitable for factor analysis. An exploration of the coefficients of correlation was also undertaken, following Coakes and Steed (1999) who recommended several correlations between variables of .30 or greater were required for factor analysis. Nine motivation items were correlated with other variables at .30 or higher, with the highest between 'break from routine' and 'relaxation' ( $r = .56$ ). While 'To visit friends and relatives' and 'To attend an event' were not correlated with any variables above .30, they were correlated with each other ( $r = .29$ ). The anti-image correlation matrix indicated no variables were below the .50 measure of sampling adequacy (Coakes and Steed, 1999). Table 5.7 shows the communalities, which are the sum of the variables squared loadings across each of the factors. Almost all items are either above .60 as recommended by Ryan (1995), or are close to it. No variables are regarded as outliers and all were included for factor analysis.

The goal of factor analysis is to reduce a collection of variables into a subset of "potent explainers" (Nunnally, 1967, p. 359). Exploratory factor analysis was undertaken using principal components analysis with a varimax rotation, which has been the most popular approach (Tabachnick and Fidell, 1996). Only factors with eigenvalues greater than 1.0 were accepted. The eigenvalue is the sum of the squares of the loadings of all variables on a factor (Child, 1970). The eigenvalue, divided by the total number of variables, explains the amount of variance accounted for by the factor. This resulted in four factors that explain 62.5

per cent of variance. Factor loadings range from .89 to .58. These results, shown in Table 5.8 indicated four dimensions: 'Stimulation', 'Family time', 'Unwinding' and 'VFR/events'. Cronbach's (1951) alpha was used to measure internal reliability within each factor. An alpha of .50 has been recommended as an indication of acceptability for factors, particularly when the number of scales is small (see Baloglu and McCleary, 1999a).

**Table 5.7 Communalities of Motivation Items**

To visit friends and relatives	.65
For a break from routine	.71
For relaxation	.66
To attend an event	.58
Spend time with my children	.81
For excitement/action	.53
To meet new people	.58
For romance	.46
To explore/learn new things	.54
See places my friends haven't	.59
To educate my children	.76

**Table 5.8 Factor Analysis - Motivation**

Factor	Alpha	Factor Loadings	Eigenvalue	Variance
<b>1. Stimulation</b>	.69		2.96	26.9%
See places friends haven't		.74		
To meet new people		.71		
To explore/learn new things		.67		
For excitement/action		.63		
<b>2. Family time</b>	.57		1.60	14.5%
Spend time with my children		.87		
To educate my children		.80		
<b>3. Unwinding</b>	.72		1.30	11.8%
For a break from routine		.83		
For relaxation		.77		
For romance		.55		
<b>4. VFR/Events</b>	.45		1.02	9.3%
To visit friends or relatives		.74		
To attend an event		.72		
Total Variance				62.5%

## Number of Domestic Short Breaks per Year

As shown in Table 5.9, the mean number of short breaks per year is four, with 640 (85.2 per cent) respondents indicating two or more. Twenty respondents list between 13 and 50 short breaks per year. If these were regarded as outliers and excluded from this analysis, the mean number of short breaks would be 3.5. Only 28 respondents (3.7 per cent) average no short breaks per year. In this group there is a higher representation from those with household income of less than \$38,000.

**Table 5.9 Number of Domestic Short Breaks per Year**

<b>Number of Annual Short Breaks</b>	<b>n</b>	<b>Valid %</b>
Nil	28	3.7
One	84	11.1
Two	173	23.0
Three	146	19.4
Four	134	17.8
Five or more	187	25.0
Total	752	100.0
Missing	11	

## Unaided ToMA Destination

This question asked respondents to name the destination that first came to mind for a domestic short break holiday by car within the next 12 months. The destination named by each respondent is considered to be representative of top of mind awareness (ToMA). Given the intent and number of short breaks, ToMA is considered indicative of likely purchase preference. As indicated previously, the higher the destination's position in the mind the stronger the chance of actual selection (Wilson, 1981). In Chapter 2, it was proposed the top-performing destination, in terms of visitor nights spent by Aucklanders, would achieve the highest ToMA ranking. Table 5.10 shows a comparison of visitor data for the year ending June 2001. However, the following points should be noted:

- The figures are for commercial accommodation only.
- No figure for Bay of Islands was sourced, as the destination was included within the Northland data.
- No figure for Mount Maunganui was sourced, as the destination was included in the Bay of Plenty data. Bay of Plenty data was temporarily unavailable due to the restructuring of Tourism Bay of Plenty.

Rotorua had the highest level of visitor nights in commercial accommodation by Aucklanders. The table also highlights the importance of Auckland as a visitor market for each of the destinations. However, the data does not provide any breakdown on issues such as such as reason for visit or motivation. Therefore the short break component was not identifiable.

**Table 5.10 Auckland Visitor Nights – Year ending June 2001**

	<b>Nights in commercial accommodation by Aucklanders</b>	<b>Total domestic nights in commercial accommodation</b>	<b>%</b>
Rotorua	473,979	967,656	49%
Taupo	260,260	776,610	34%
Northland	271,600	397,600	68%
Coromandel	203,370	466,629	44%

Source: Commercial Accommodation Monitor, July 2001.

The ToMA results, shown in Table 5.11, show a strong position held by Rotorua, which is listed by one in four respondents (24.1 per cent). This is three times the number of fifth ranked destination, Mount Maunganui (8.3 per cent). The top six destinations account for 618 respondents (82.8 per cent). If the responses for Bay of Islands and 'Other Northland' are combined, the total for Northland would account for 170 (22.3 per cent) respondents. This would place Northland second, only slightly behind Rotorua, but well ahead of the third placed destination, Coromandel. It is perhaps worth noting the questionnaire was distributed during early winter. Therefore the low ranking of the closest ski destination to Auckland, Ruapehu (n=25, 3.4 per cent) suggests the timing did not disadvantage the lake and beach resort areas. The results also support the comfortable driving time responses, since the top five destinations, excluding 'Other Northland' are within

the mean of 3.8 hours. Most of the minor destinations listed are outside the range of this driving time.

**Table 5.11 Unaided ToMA Destination**

<b>Destination</b>	<b>n</b>	<b>%</b>
Rotorua	180	24.1
Coromandel	108	14.5
Taupo	98	13.1
Bay of Islands	97	13.0
Other Northland	73	9.8
Mt Maunganui/Tauranga/Papamoa	62	8.3
Ruapehu	25	3.4
Waikato	22	2.9
Hawkes Bay	17	2.3
Gulf islands/other Auckland	16	2.1
Other Bay of Plenty	12	1.6
Wellington	11	1.5
Other- not within one day drive	8	1.1
Taranaki	7	.9
Eastland	5	.7
Palmerston North	2	.3
Wanganui	1	.1
King Country	1	.1
Waiouru	1	.1
Total	746	100.0
Missing	17	

## Decision Sets

This question asked respondents to list the other destinations they would probably consider for their next short break. Along with ToMA choice, these responses form the decision set. The mean number of destinations in respondents' decision sets is 3.9. This is consistent with Howard's (1963) proposition that the evoked decision set would be three to four brands, as well as Woodside and Sherrell's (1977) suggestion the evoked set size of holiday destinations would be four +/- two. As shown in Table 5.12, the set sizes of 706 of 748 respondents' (94.4 per cent) are within this range. This is surprising, given it could be expected consumers would be familiar with a large number of domestic short break destinations. The conceptual implication is travel context is not an influence, but is a function of respondents' internal processes. In this regard the thesis sample supports overseas results from the smaller samples of: 30 respondents (Woodside and Carr, 1988), 40 (Bronner and de Hoog, 1985), 71 (Woodside and Sherrell, 1977), 92 (Woodside and Lysonski, 1989) 112 (Thompson and Cooper, 1979), 180 and 263 (Woodside, Ronkainen and Reid, 1977).

**Table 5.12 Decision Set Size**

<b>Number of Destinations in Evoked Set</b>	<b>n</b>	<b>Valid %</b>
1	14	1.9%
2	115	15.4%
3	177	23.7%
4	203	27.1%
5	134	17.9%
6	77	10.3%
7 or more	28	3.7%
Total	748	100.0%
Missing	15	

Table 5.13 shows the total number of times each destination is mentioned in respondents' decision sets, including any ToMA listing. Rotorua again ranks highest, being listed by 463 out of 748 respondents (61.9 per cent). Decision sets are recorded from the first six destinations mentioned by each respondent. Only 28 respondents (3.7 per cent) list seven or more destinations. Only the first six destinations listed by each respondent have been included for analysis.

**Table 5.13 Decision Set Composition**

<b>Destination</b>	<b>n</b>	<b>%</b>
Rotorua	463	61.9%
Coromandel	438	58.6%
Bay of Islands	394	52.7%
Taupo	363	48.5%
Other Northland	317	42.4%
Mount Maunganui/Tauranga/Papamoa	257	34.4%
Waikato	140	18.7%
Hawkes Bay	99	12.2%
Ruapehu	90	12.0%
Other Bay of Plenty	72	9.6%
Gulf Islands/Auckland	57	7.6%
Wellington	54	7.2%
Taranaki	50	6.7%
Eastland	25	3.3%
Palmerston North	15	2.0%
Other	42	5.6%

## Qualitative Feedback

As discussed in Chapter 4, space was provided on the back page of the questionnaire booklet for respondents to make any additional comments about domestic short break holidays. A total of 182 of the 763 respondents (23.9 per cent) used the opportunity to provide additional feedback. Respondents' comments, which range from one-liners to a typed letter, are mostly constructive. A small number of respondents make comments specific to the destinations included in the questionnaire: Rotorua (18 out of 182 respondents), Bay of Islands/Northland (12), South Island (11), Taupo (7), Coromandel (3), Mount Maunganui (3). Specific comments are included in appropriate sections of the results discussions. Content analysis identified the following themes:

- Price/value/packages (46 out of 182 respondents)
- Accommodation issues (38)
- Tourist information (26)
- Young family needs (24)
- Cafes/food (23)
- Service/facility standards (21)
- Transport (12)
- Road conditions/traffic (11)
- Toilet facilities (8)
- Touristy/tackiness (7)
- Camping facilities (7)
- Signage (5)
- Maori culture (5)
- Shopping (5)

## Chapter Summary

The distribution of 3000 questionnaires to a random selection of Auckland households achieved a return from 763 respondents, which represents a useable response rate of 25.9 per cent. This is within the range of those achieved for overseas studies that involved the rating of multiple destinations. Analysis of response patterns indicates satisfactory levels of internal consistency. The sample characteristics were summarised and compared to those of the wider Auckland population. The response provides a rich data set, with 763 respondents and 165 variables generating 125,895 data cells. The chapter provides insights to some of the characteristics of Aucklanders' domestic short break holidays. In summary, these results suggest short breaks represent a major component of respondents' holiday activities. Almost all respondents indicate a likelihood of taking a domestic short break holiday within the next twelve months. The mean maximum comfortable driving time to a short break destination is 3.8 hours, which enables a likely geographic boundary of destinations. The majority of respondents indicate taking two or more short breaks per year. Exploratory factor analyses identifies four dimensions of motivation, which have been labelled: 'Stimulation', 'Family time', 'Unwinding', and 'VFR/Events'. The motivation results are consistent with overseas studies, suggesting the travel context is not a moderating variable for the highest rating motivations such as: 'For relaxation' and 'For a break from routine'.

Rotorua emerges as a clear leader in terms of unaided ToMA. This is associated with the commercial accommodation data showing Rotorua hosted the largest number of Aucklanders for the year ending June 2001. The highest ranked ToMA destinations are also the five destinations selected for the IPA stage of the questionnaire. The mean number of destinations in respondents' decision sets is 3.5, which is consistent with overseas studies. This result suggests familiarity with domestic destinations does not affect set size.

# Chapter 6 – Destination Positions

This chapter examines the positions of the competitive set of destinations. The discussion begins with the attribute importance ratings, to identify those deemed determinant in the domestic short break travel context. Exploratory factor analyses enable the 20 attributes to be synthesised into four key dimensions of domestic short break destination attractiveness. Following this, the performance of each destination, across the range of attributes and four factor dimensions, is presented. The IPA matrices work well at the individual destination analysis level, in terms of identifying perceived strengths and weaknesses. However, the combined matrix for all destinations across all attributes is cumbersome as a positioning analysis tool. Ultimately, a factor-analytic IPA proves successful in identifying Rotorua's competitive position.

The MDS results are then presented in the form of a perceptual map, which provides a positioning comparison with the IPA output. The chapter also presents the results of the affect scales for each destination. As discussed in Chapter 2, affect represents an individual's positive, neutral or negative feelings towards an object, and few papers have investigated this component of destination image. The affective response matrix provides a useful comparison with the IPA and MDS outputs.

Also, since one of the goals of the thesis has been to explore the value of positioning analysis for practitioners, the chapter discusses a series of results meetings held with six industry organisations in five regions. The meetings proved productive in terms of implications for future RTO marketing planning.

The chapter concludes there are two distinctive short break positions occupied by two leading destinations, which are based on quite different dimensions.

## Attribute importance

It is perhaps important to note respondents were asked to rate the importance of these attributes when considering a domestic short break holiday in general, rather than thinking about a short break to any particular destination. These same attribute importance results are then subsequently compared to the attribute-performance ratings of each destination. A seven-point scale was used, anchored at 'Of no importance' (1) and 'Very important' (7). The grand mean for the 20 attribute importance items is 4.38. Table 6.1 shows the mean importance scores for all attributes. Nine of these attributes rate above the grand mean, which has implications in the attempt to identify determinant attributes. A further four attributes are below the grand mean but above the scale mid-point.

The means of the remaining seven attributes are lower than the scale mid-point, albeit only marginally in some cases. This is not surprising given most of these would be regarded as niche activities. For example, even though the questionnaire was distributed in early winter, 'Snow sports' is clearly not important for the sample in general, with only 42 respondents (6.6 per cent) rating this attribute as 'Very important'. This result also supports the low ToMA ranking of ski destinations such as Ruapehu.

Table 6.1 also shows the number and percentage of respondents who rate each attribute as 'Very Important', which is the maximum score of 7. These range from 342 respondents (48.3 per cent) for 'Good value for money' to only 19 respondents (2.9 per cent) for 'Maori culture experiences'. The two highest rating attribute importance means also represent the most popular topics of qualitative comments. The following is a typical suggestion:

*I would like to see more weekend "get-away" packages for families with accommodation/breakfast (maybe dinner) and tickets to attractions (given a choice for age appropriate activities) so there are no surprises, no add-ons. Gives families an opportunity to discover their own country and all the activities each area offers. Offer 'family friendly' hotels/motels. (Respondent 503).*

**Table 6.1 Attribute importance Ratings**

<b>Attribute</b>	<b>Rank</b>	<b>N</b>	<b>Mean</b>	<b>Std</b>	<b>n<sup>1</sup></b>	<b>%<sup>2</sup></b>
Suitable accommodation	1	753	5.99	1.19	342	45.4%
Good value for money	2	752	5.99	1.29	363	48.3%
A comfortable drive from home	3	755	5.50	1.42	264	35.0%
Natural scenic beauty	4	756	5.37	1.40	198	26.2%
Good cafes/restaurants	5	746	5.20	1.62	191	25.6%
Good weather	6	752	5.07	1.49	172	22.9%
Lots to see and do	7	747	4.85	1.51	128	17.1%
Good ocean beaches	8	747	4.50	1.82	136	18.2%
Friendly locals	9	742	4.46	1.74	110	14.8%
Places for swimming or boating	10	741	4.34	1.92	124	16.7%
Not too touristy	11	746	4.34	1.76	100	13.4%
Hot pool bathing	12	721	4.15	1.77	75	10.4%
Places for walking/tramping	13	734	4.11	1.86	94	12.8%
Shopping	14	714	3.82	1.75	55	7.7%
Wineries	15	704	3.79	1.93	64	9.1%
Adventure activities	16	711	3.56	1.73	42	5.9%
Fishing	17	662	3.23	2.11	75	11.3%
Close to other holiday destinations	18	696	3.02	1.74	23	3.3%
Snow sports	19	634	2.74	1.90	42	6.6%
Maori culture experiences	20	663	2.41	1.63	19	2.9%
<b>Grand mean</b>			<b>4.38</b>	<b>0.86</b>		

Notes:

<sup>1</sup> Denotes the number of respondents who rated the attribute's importance as 7<sup>2</sup> Denotes the percentage of respondents who rated the attribute's importance as 7

The results support the proposition there are two types of attributes – those that are generic and those that are more destination specific. In this case it is suggested the six most important attributes are generic, although 'within a comfortable drive' is context specific. It is not surprising the generic items rank higher in a sample that would segment with reference to location specific activities.

Table 6.2 shows the number of respondents who rate each attribute above the scale mid-point. For example, while the mean importance for 'Wineries' is below

the scale mid-point, a total of 254 respondents (36.1 per cent) rate the attribute higher than 4. Given wine tourism developments have only occurred relatively recently, this attribute warrants future tracking. However, only 81 respondents (12.2 per cent) rate 'Maori culture experiences' above the scale mid-point. This is consistent with Ryan (2003) as well as Moore, Fairweather and Simmons (2000) who found Maori products held little appeal for domestic travellers.

**Table 6.2 Number of Respondents Rating above the Scale Mid-point**

<b>Attribute</b>	<b>n</b>	<b>Valid %</b>
Good value for money	651	86.6%
Suitable accommodation	557	74.0%
Comfortable drive	558	73.9%
Natural scenic beauty	558	73.8%
Good cafes/restaurants	521	69.8%
Good weather	465	61.8%
Not too touristy	449	60.2%
Lots to see/do	436	58.4%
Good ocean beaches	380	50.9%
Friendly locals	365	49.2%
Places for swimming or boating	362	48.9%
Places for walking/tramping	316	43.1%
Wineries	254	36.1%
Shopping	256	35.9%
Hot pool bathing	221	30.7%
Adventure activities	207	29.1%
Fishing	186	28.1%
Close to another destination	151	21.7%
Snow sports	122	19.2%
Maori culture experiences	81	12.2%

These results provide the first indication of attribute importance in the context of New Zealand domestic short break holidays. Rotorua tourism interests would perhaps be disappointed with the ratings for many of the attributes below the grand mean, given that they have been regarded as key features in the destination's product range.

## Factor Analysis

The literature review found factor analysis had been the most frequently used data analysis technique in previous destination image studies. As highlighted in Appendix A, the procedure was reported in 41 out of 142 published destination image papers from the period 1973-2000 (Pike, 2002a). The appeal of factor analysis is as a data reduction procedure where sub-sets of variables are identified that correlate with one another, but which are independent of other sub-sets. Sub-sets are referred to as factors (Tabachnick and Fidell, 1996, p. 635). Factor analysis attempts to explain the coefficients of correlations between variables, with as few factors as possible (Child 1970, Foster 1998).

As discussed in Chapter 5, the KMO for the 20 attribute importance ratings is .83. This indicates suitability of the data for factor analysis, since values above .60 are recommended (Tabachnick and Fidell, 1996). An examination of the correlations of coefficients reveals all but one attribute, 'Within a comfortable drive', is correlated with at least one other at the recommended .30 level (see Coakes and Steed 1999, Foster 1998, Pallant 2001, Tabachnick and Fidell 1996). While this attribute could be regarded as an outlier, it was included in the first factor analysis. The highest correlation was between 'Good ocean beaches' and 'Places for swimming or boating' ( $r = .57$ ). The anti-image correlation matrix indicated no variables below the .50 measure of sampling adequacy (Coakes and Steed, 1999). Communalities ranged from .71 to .31 and were regarded as satisfactory (see Child, 1970).

An exploratory factor analysis of the attribute importance items was undertaken using principal components analysis with a varimax rotation. Only factors with eigenvalues greater than 1.0 were accepted. Tabachnick and Fidell suggested this should generate four to seven factors from a set of 20 variables. This produced five factors that explain 53.9 per cent of total variance. Cronbach's (1951) alpha was used to measure the internal reliability of items within each factor. The factor alphas range from .74 to .56, which are regarded as satisfactory, particularly

considering the small number of scale items in each dimension. Factor loadings range from .80 to .26. Since only one attribute, 'Within a comfortable drive', is below .40, the loadings are considered satisfactory (see Kline 1994, Stevens 1996).

It should be noted that factor analysis is a technique for exploring data (Pallant 2001, Ryan 1995), and "the interpretation and the use you put it to is up to your judgement, rather than any hard and fast statistical rules" (Pallant, 2001, p. 161). Therefore a number of other factor analyses were trialled, by removing attributes and using orthogonal and oblique rotation techniques, following Parasuraman, Zeithaml and Berry (1988). However, oblique rotation techniques are much more difficult to interpret (Tabachnick and Fidell, 1996, p. 666). Therefore an orthogonal solution was retained, following Pallant (2001, p.155) who suggested "many researchers conduct both orthogonal and oblique rotations and then report the clearest and easiest to interpret". In searching for a simple structure (see Kline 1994), where factors have a few high loadings, the cleanest rotated component matrix was generated from a factor analysis using 16 attributes. Four attributes, 'Maori culture experiences', 'Snow sports', 'Within a comfortable drive' and 'Wineries', were not included due to low correlations with other attributes. All other attributes are correlated with between two and six other attributes at greater than .30.

The KMO for this analysis is .81, and the combined alpha for the 16 items is .82. Again, principal components analysis with a varimax rotation was used and only factors with eigenvalues greater than 1 have been accepted. A four-factor solution was generated, which explains 55.2 per cent of total variance. An examination of Cattell's (1966) scree plot points to a break point, or the development of a linear shape, at factor three. However, a further analysis limiting the number of factors to three did not offer a cleaner solution. Therefore the four-factor solution has been retained. Communalities range from .68 to .43. Each factor also features a minimum of three attributes, as recommended by Kline (1994).

Child (1970) cautioned when dealing with human behaviour, any conclusions derived from factor analysis must be treated with caution. However, the four-factor solution does offer a reasonable indication of important domestic short break dimensions, given the purpose of the factor analysis is exploratory rather than predictive. As suggested by Child, factor analysis seeks to create some sense out of the chaos that is our environment. It is for this purpose factor analysis was originally designed almost a century ago (Kline, 1994). In each factor, attributes have been presented in order of factor loadings, which represent the correlation of the attribute with the factor. Those with the highest loadings point to the factor “flavour” (Child, 1970, p. 47). All loadings are above .40. As shown in Table 6.3 the four factors are labelled:

- The good life/infrastructure. The five attributes in this dimension explain 27.9 per cent of total variance, and point to an enjoyment of comforts, and perhaps indulgences, away from home.
- Getting away from it all. The five attributes in this dimension explain 13.2 per cent of total variance, and suggest a preference towards nature and down to earth surroundings.
- Outdoor play. These three attributes explain 7.3 per cent of variance and point to an enjoyment of outdoor activities.
- The weather. The three attributes in this dimension explain 6.8 per cent of variance, and include practical considerations of convenience when planning a short break. The rationale for the name of this factor is the possible influence of weather on the importance of ‘lots to do’.

Extracted factors should explain at least 60 per cent of the total variance (Malhotra et al., 1996), or even 70 per cent (Ryan 1995, Stevens 1996). Nunnally (1967, p. 305) suggested for 20 variables, five factors explaining 50 per cent of variance “do a good job of condensing the correlations among the 20 variables”. In destination image studies, Goodrich (1979, p. 8) regarded his four-factor solution that accounted for 57.5 per cent of variance as explaining a “substantial share” of variance. Likewise, Kim, Crompton and Botha (2000) reported factors explaining 57.5 per cent of variance. Others with variance below .60 have included 59.3 per

cent (Bignon, Hammitt and Norman, 1998), 58.6 per cent (Baloglu, 1998), 53 per cent (Crompton, Fakeye and Lue, 1992) and 46 per cent/56.8 per cent (Brown, 1998). Since no valid scale exists to measure destination image, the factor structure provides a reasonable insight to the dimensions used by Aucklanders to differentiate domestic short break destinations. After all, a good factor analysis is one that makes sense (Tabachnick and Fidell, 1996, p. 636).

**Table 6.3 Exploratory Factor Analysis of Attribute Importance**

Factor	Alpha	Factor Loadings	Eigenvalue	Variance	Comm.
<b>1. The good life/infrastructure</b>	.69		4.47	27.9%	
Cafes/restaurants		.79			.63
Suitable accommodation		.73			.59
Shopping		.59			.55
Hot pool bathing		.56			.51
Value for money		.44			.43
<b>2. Getting away from it all</b>	.73		2.11	13.2%	
Natural scenic beauty		.75			.62
Not too touristy		.71			.52
Ocean beaches		.64			.61
Walking/tramping		.63			.46
Friendly locals		.43			.44
<b>3. Outdoor play</b>	.66		1.17	7.3%	
Places for swimming or boating		.72			.68
Fishing		.67			.58
Adventure activities		.58			.49
<b>4. The weather</b>	.64		1.09	6.8%	
Good weather		.75			.63
Lots to see/do		.65			.53
Close to other destinations		.64			.60
Total Variance				55.2%	

## Rotorua Performance

The Cronbach alpha for the 20 Rotorua performance scale items is .88, indicating reliability. Table 6.4 shows the perceived performance of Rotorua, in comparison to each of the attribute importance ratings. 'Snow sports' is not included. The attributes are shown in order of their performance rank. For example, Rotorua's highest performing attribute is 'Hot pool bathing' (6.54), which ranks 12<sup>th</sup> in importance (4.15). This is the highest performance score by any destination on any attribute. The inclusion of 'Maori culture experiences' is also justified by the attribute achieving the second highest performance rating of any destination attribute (6.37). Only three attribute-performance means are below the scale mid-

point. These are 'Not too touristy', 'Wineries' and 'Good ocean beaches'. Paired-samples *t*-tests identify significant gaps, at the .01 level, between attribute importance and Rotorua's performance on 15 of the 19 attributes. The significance of these gaps is discussed later in the chapter.

**Table 6.4 Rotorua Performance**

Attribute importance	Rank	Mean	Std	n	Rotorua Perf. Rank	Mean	Std	n	Difference	t-Statistic	n	Sig
Hot pool bathing	12	4.15	1.77	721	1	6.54	0.91	752	2.39	-34.674	712	.000
Maori culture	20	2.41	1.63	663	2	6.37	1.13	721	3.96	-53.030	632	.000
Lots to see and do	7	4.85	1.51	747	3	6.08	1.14	758	1.23	-19.003	742	.000
Suitable accommodation	1	5.99	1.20	753	4	5.99	1.09	748	0	-0.164	738	.870
Adventure activities	16	3.56	1.73	711	5	5.73	1.24	742	3.30	-30.814	695	.000
Natural scenic beauty	4	5.37	1.40	756	6	5.73	1.33	753	0.36	-5.551	746	.000
Places for walking/ tramping	13	4.11	1.86	734	7	5.64	1.28	722	1.53	-20.643	698	.000
Comfortable drive from home	3	5.50	1.42	755	8	5.56	1.46	759	0.06	-1.054	751	.292
Good cafes/ restaurants	5	5.20	1.62	746	9	5.47	1.24	744	0.27	-4.256	728	.000
Close to other destinations	18	3.02	1.74	696	10	5.44	1.33	747	2.42	-32.185	683	.000
Value for money	2	5.99	1.29	752	11	5.03	1.32	737	-0.96	15.816	726	.000
Fishing	17	3.23	2.11	662	12	4.71	1.80	645	1.48	-12.546	673	.000
Shopping	14	3.82	1.75	714	13	4.62	1.46	734	0.80	-11.110	690	.000
Good weather	6	5.07	1.49	752	14	4.45	1.33	755	-0.62	9.737	745	.000
Places for swimming/ boating	10	4.34	1.92	741	15	4.43	1.83	703	0.09	-0.532	684	.595
Friendly locals	9	4.46	1.74	742	16	4.34	1.48	714	-0.12	2.101	698	.036
Not too touristy	11	4.34	1.76	746	17	2.96	1.70	739	-1.38	14.848	723	.000
Wineries	15	3.79	1.93	704	18	2.57	1.57	468	-1.33	12.832	446	.000
Ocean beaches	8	4.50	1.82	747	19	1.63	1.37	557	-2.87	31.421	550	.000
GRAND MEAN		<b>4.38</b>	<b>0.86</b>	<b>763</b>		<b>4.90</b>	<b>0.81</b>	<b>762</b>				

For Rotorua, the qualitative comments generally relate to two aspects: commercialism and service standards:

*We recently had a family holiday at Rotorua (13 people). We had a budget, but all entertainment was so expensive even down to watching a sheep show. There should be more concession prices for large groups or families. (Respondent 712).*

*Rotorua is too overly avaricious and mass produced. You don't feel welcomed and special there. (Respondent 218).*

*More staff at peak periods at popular venues would help...queued for 20 minutes to get up the sky-lift in Rotorua. (Respondent 101).*

*I believe that the likes of Rotorua should look at Queenstown as a good example of how to make a tourist destination more exciting. In Queenstown the shops are open everyday until 10pm. This creates a wonderful exciting and interesting environment which I believe tourists are looking for. During a recent visit to Rotorua I couldn't believe how quiet and boring downtown Rotorua was like by 7.00-8.00pm. Other than the odd souvenir type of shop all other shops were long closed. (Respondent 128).*

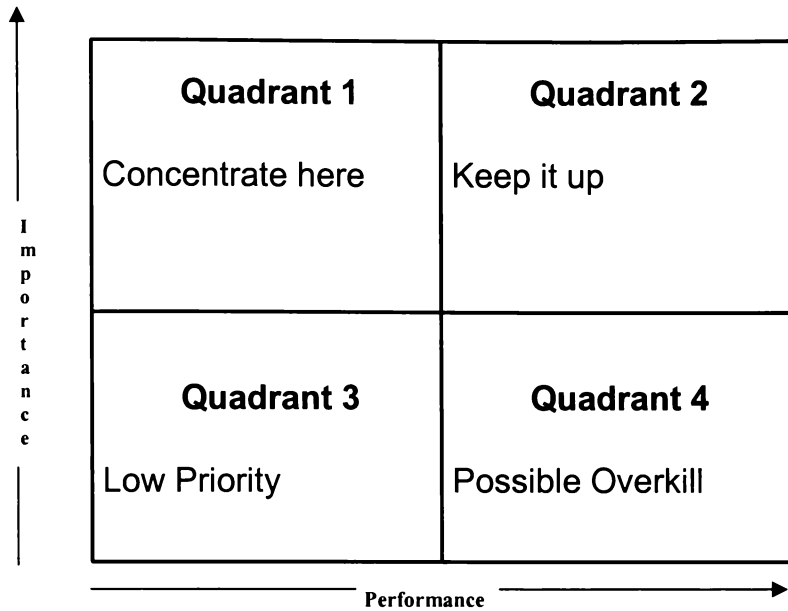
*Rotorua visitor information centre is overloaded/overcrowded. (Respondent 184).*

*Rotorua smells and is unsafe for tourists unless they travel in a large group. Tourists need safety, care and attention for accommodation eating and visiting. Lack of any one of these will drive them home, and has done so. (Respondent 499).*

As discussed in Chapter 4, one of the benefits of IPA, particularly for practitioners, is the visual representation of data. Figure 6.1 re-presents the IPA matrix structure, which plots attributes into four quadrants. The optimum result is for attributes to be plotted in Quadrant 2, 'Keep it up', which denotes a strong perceived performance on determinant attributes.

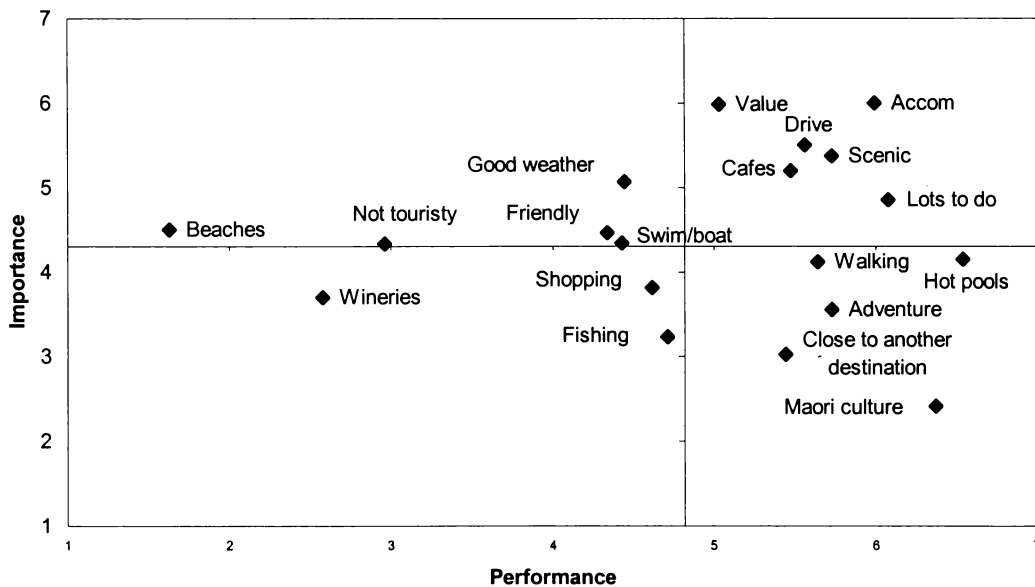
Figure 6.2 presents the IPA Matrix for Rotorua. The y-axis cross-hair is plotted at the grand mean of all destinations' performance (4.82). This is noticeably higher than the grand mean for attribute importance (4.38), which reflects positively on the destinations. The x-axis cross-hair is plotted at 4.30, slightly lower than the grand mean for attribute importance, to subjectively force two attributes into Quadrant 1. In this way 11 attributes are identified in Quadrants 1 and 2, and are therefore considered determinant.

Figure 6.1 IPA Matrix



Source: Martilla and James (1977)

Figure 6.2 Rotorua IPA Matrix



**Quadrant 1 - Concentrate Here Rotorua**

Five attributes are plotted in Quadrant 1, which could be regarded as 'missed opportunities' for Rotorua. This quadrant signals the need for Rotorua to concentrate here by attempting to improve the attribute's actual or perceived performance. These attributes are: 'good weather', 'friendly locals', 'not too

touristy', 'places for swimming or boating' and 'ocean beaches'. The positions of 'friendly locals' and 'not too touristy' support the suggestion of Lawson, Thyne and Young (1997) that Rotorua is one of those places New Zealanders may bypass due to perceptions the destination caters to overseas tourists and is therefore touristy. Publicity about crime in Rotorua, as discussed in Chapter 3, may also have had an influence on these results. Rotorua stakeholders may also be interested in the under-performance of 'places for swimming or boating', given the district's seventeen lakes. Related to this issue, 'ocean beaches' may appear an impossible product improvement for an inland destination. However, opportunities do exist to improve perceptions, given that Rotorua is only 30-40 minutes drive from the Bay of Plenty coast. Improving the weather however could be problematic!

### **Quadrant 2 - Keep It Up Rotorua**

Six attributes are plotted in Quadrant 2. Without reference to competing destinations, these attributes could be regarded as potential 'strengths':

- Suitable accommodation
- Good value for money
- A comfortable drive from home
- Good cafes/restaurants
- Natural scenic beauty
- Lots to see and do

This preliminary examination indicates Rotorua's strong ToMA and decision set performances, outlined in Chapter 5, may be associated with these attributes.

### **Quadrant 3 - Low Priority Rotorua**

Three attributes are plotted in Quadrant 3, indicating a relatively weak performance by Rotorua on non-determinant attributes. These attributes are 'fishing', 'shopping' and 'wineries'. Of interest in this quadrant is the position of 'fishing', since Rotorua's trout fishing is regarded locally as a strength. The

implication, when considering the question 'who cares?', is these are clearly either niche activities, or activities that may be undertaken during a visit, but they are not determinant in the destination decision process. Instead, they may be subsumed under the 'lots to do' attribute.

#### **Quadrant 4 - Possible Overkill Rotorua**

Five attributes are plotted in Quadrant 4, where the term 'wasted effort' may be pertinent: 'close to other destinations', 'places for walking/tramping', 'adventure activities', 'hot pool bathing' and 'Maori culture experiences'. Of most interest are the last two, which are regarded as Rotorua icons.

### **Gap Analysis**

Placement of the x and y axes at different points on the IPA Matrix will lead to differing interpretations (Novatorov, 1997). Novatorov stressed the importance of identifying the highest discrepancy gaps between perceived performance and importance. Paired-samples t-tests indicate significant differences between importance and Rotorua performance on 15 attributes. Figure 6.3 visually highlights the importance/performance gaps for Rotorua.

#### **Rotorua Product Deficiencies**

The greater the deficiency gap the greater the dissatisfaction with the product (Sethna, 1982). Significant deficiency gaps for Rotorua are highlighted in Table 6.5. Of these the three attributes of most immediate concern appear to be 'good weather', 'ocean beaches' and 'not too touristy', all determinant attributes. The development of winery products in other regions suggests importance for this attribute may increase in the future.

#### **Rotorua Product Proficiencies**

Table 6.6 highlights the significant proficiency gaps for Rotorua. Of these nine attributes, two are determinant. The implication is attributes featuring in quadrants 3 and 4 may require less emphasis in general promotions.

Figure 6.3 IPA Gap Analysis - Rotorua

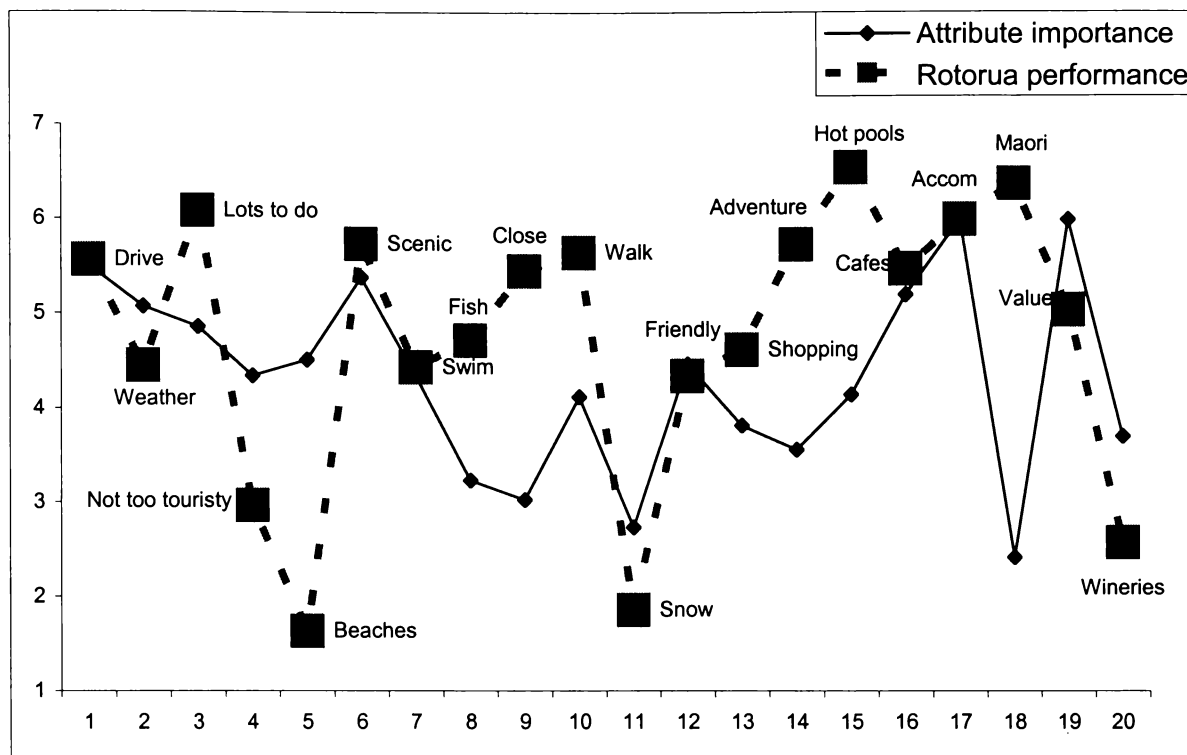


Table 6.5 Rotorua Performance Deficiencies

Attribute	Attribute Status	Quadrant	IPA Implication
Good weather	Determinant	1	Concentrate here
Not too touristy	Determinant	1	Concentrate here
Good ocean beaches	Determinant	1	Concentrate here
Good value for money	Determinant	2	Strength
Wineries	Non-determinant	3	Low priority

Table 6.6 Rotorua Performance Proficiencies

Attribute	Attribute Status	IPA Quadrant	IPA Implication
Lots to see/do	Determinant	2	Strength
Scenic beauty	Determinant	2	Strength
Fishing	Non-determinant	3	Low priority
Close to other destinations	Non-determinant	4	Possible overkill
Walking/tramping	Non-determinant	4	Possible overkill
Shopping	Non-determinant	3	Low priority
Adventure activities	Non-determinant	4	Possible overkill
Hot pool bathing	Non-determinant	4	Possible overkill
Maori culture experiences	Non-determinant	4	Possible overkill

## Comparative IPA

One of the potential traps in IPA is assessing one brand in isolation (Chapman, 1993). While the identification of performance gaps will be of value, misleading information may be applied in positioning planning. If Rotorua's IPA Matrix is used to plan promotional campaigns, the recommendations would be to emphasize or de-emphasize attributes in Figure 6.2 (Sethna, 1982). However, the thesis is interested in positioning, where a key requirement is a frame of reference with the competition.

## Bay of Islands IPA

The Cronbach alpha for Bay of Islands performance items is .87. Table 6.7 shows the perceived performance of Bay of Islands, in comparison to each attribute's importance. 'Snow sports' is not included. Attributes are listed in order of the performance ranking. For example, the Bay of Islands' highest performing attribute is 'natural scenic beauty' (6.05), which ranks fourth in importance (5.37). Only four attribute performance means are below the scale mid-point, two of which only marginally so. Paired-samples t-tests indicate significant differences, at the .01 level, between the importance and perceived performance of 17 out of 19 attributes. Figure 6.4 shows the Bay of Islands IPA. Four determinant attributes are plotted in Quadrant 1, while seven are plotted in Quadrant 2. Bay of Islands is positively differentiated from Rotorua by three attributes: 'good weather', 'good ocean beaches', and 'places for swimming/boating'. Interestingly, Rotorua features only one determinant attribute that is not present in Bay of Islands' Quadrant 2, which is 'good value'.

**Table 6.7 Bay of Islands Performance**

Attribute importance	Rank	Mea n	Std	n	Perf Rank	Mea n	Std	n	Difference	t-Statistic	N	Sig
Natural scenic beauty	4	5.37	1.40	756	1	6.05	1.09	751	0.68	-12.286	744	.000
Places for swimming or boating	10	4.34	1.92	741	2	5.98	1.18	737	1.64	-21.914	720	.000
Fishing	17	3.23	2.11	662	3	5.90	1.41	689	2.67	-29.166	616	.000
Suitable accommodation	1	5.99	1.20	753	4	5.69	1.17	736	-0.30	5.803	726	.000
Lots to see and do	7	4.85	1.51	747	5	5.55	1.22	751	0.70	-11.055	737	.000
Good weather	6	5.07	1.49	752	6	5.41	1.15	754	0.34	-6.212	744	.000
Places for walking/tramping	13	4.11	1.86	734	7	5.16	1.44	707	1.05	-13.752	686	.000
Good ocean beaches	19	2.74	1.90	634	8	5.07	1.59	737	2.33	-6.551	723	.000
Comfortable drive from home	3	5.50	1.42	755	9	5.02	1.60	752	-0.48	6.461	744	.000
Close to other holiday destinations	18	3.02	1.74	696	10	4.90	1.59	730	1.88	-24.799	673	.000
Adventure activities	16	3.56	1.73	711	11	4.84	1.49	695	1.28	-16.424	658	.000
Good cafes/restaurants	5	5.20	1.62	746	12	4.81	1.34	723	-0.39	5.966	710	.000
Good value for money	2	5.99	1.29	752	13	4.63	1.41	705	-1.36	20.507	593	.000
Friendly locals	9	4.46	1.74	742	14	4.46	1.41	695	-	0.636	679	.525
Maori culture experiences	20	2.41	1.63	663	15	4.30	1.88	598	1.89	-19.188	541	.000
Not too touristy	11	4.34	1.76	746	16	3.87	1.59	742	-0.47	5.626	726	.000
Shopping	14	3.82	1.75	714	17	3.75	1.48	705	-0.07	1.537	668	.125
Wineries	15	3.79	1.93	704	18	3.00	1.68	507	-0.79	9.799	489	.000
Hot pool bathing	12	4.15	1.77	721	19	2.89	1.84	519	-1.26	13.998	499	.000
<b>GRAND MEAN</b>		<b>4.38</b>	<b>0.86</b>	<b>763</b>		<b>4.75</b>	<b>0.82</b>	<b>759</b>				

**Figure 6.4 Bay of Islands IPA Matrix**



## Coromandel IPA

The Cronbach alpha for the Coromandel performance items is .88. Table 6.8 shows the perceived performance of Coromandel in comparison to each attribute's importance. 'Snow sports' is not included. Attributes are listed in order of performance ranking. For example, as with the Bay of Islands, Coromandel's highest performing attribute is 'natural scenic beauty' (6.27), which is ranked fourth in importance (5.37). Only four attribute performance means are below the scale mid-point, two of which only marginally so. Paired-samples t-tests indicate significant differences between importance and perceived performance of 17 attributes.

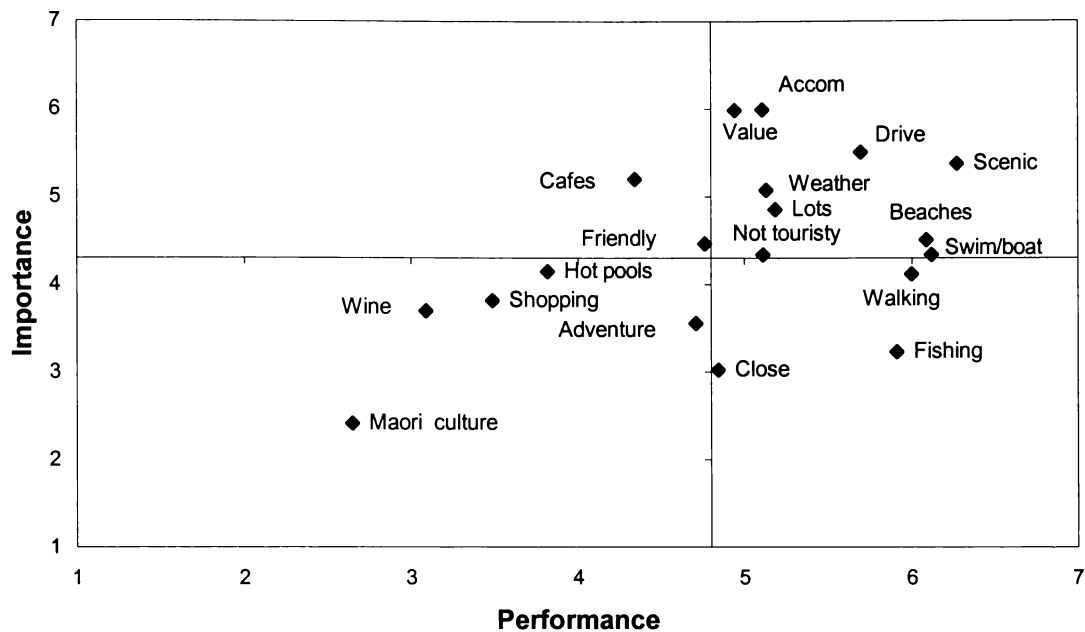
**Table 6.8 Coromandel Performance**

Attribute importance	Rank	Mean	Std	N	Perf Rank	Mean	Std	n	Difference	t-Statistic	n	Sig
Natural scenic beauty	4	5.37	1.40	756	1	6.27	0.98	757	0.90	-16.845	750	.000
Places for swimming or boating	10	4.34	1.92	741	2	6.12	1.12	743	1.78	-24.300	725	.000
Good ocean beaches	8	4.50	1.82	747	3	6.09	1.13	750	-1.59	-22.037	736	.000
Places for walking/tramping	13	4.11	1.86	734	4	6.00	1.67	728	1.89	-26.616	704	.000
Fishing	17	3.23	2.11	662	5	5.91	1.38	672	2.68	-29.129	603	.000
Comfortable drive from home	3	5.50	1.42	755	6	5.69	1.40	754	-0.19	-2.820	747	.005
Lots to see and do	7	4.85	1.51	747	7	5.18	1.35	748	-0.33	-5.095	732	.000
Good weather	6	5.07	1.49	752	8	5.13	1.22	757	-0.06	-0.979	746	.328
Not too touristy	11	4.34	1.76	746	9	5.11	1.42	752	-0.77	-9.635	735	.000
Suitable accommodation	1	5.99	1.20	753	10	5.11	1.27	724	-0.88	15.136	714	.000
Good value for money	2	5.99	1.29	752	11	4.94	1.19	699	-1.05	17.525	690	.000
Close to other holiday destinations	18	3.02	1.74	696	12	4.84	1.63	736	1.82	-23.186	677	.000
Friendly locals	9	4.46	1.74	742	13	4.76	1.40	701	0.30	-3.822	684	.000
Adventure activities	16	3.56	1.73	711	14	4.71	1.48	696	1.15	-13.720	655	.000
Good cafes/restaurants	5	5.20	1.62	746	15	4.34	1.40	708	-0.86	12.314	697	.000
Hot pool bathing	12	4.15	1.77	721	16	3.82	1.90	609	-0.33	3.320	580	.001
Shopping	14	3.82	1.75	714	17	3.49	1.49	702	-0.33	5.017	664	.000
Wineries	15	3.79	1.93	704	18	3.09	1.66	524	-0.70	8.343	502	.000
Maori culture experiences	20	2.41	1.63	663	19	2.65	1.54	525	0.24	-0.951	472	.342
<b>GRAND MEAN</b>		<b>4.38</b>	<b>0.86</b>	<b>763</b>		<b>4.87</b>	<b>0.81</b>	<b>759</b>				

Figure 6.6 shows the IPA Matrix for Coromandel. Of the 11 determinant attributes, only two are plotted in Quadrant 1, while nine are plotted in Quadrant 2. This also appears to be a superior performance to Rotorua. In Quadrant 2, Coromandel is positively differentiated from Rotorua by four attributes: 'good weather', 'ocean beaches', 'not too touristy' and 'places for swimming/boating'. Again, Rotorua is

differentiated by only one determinant attribute, which in this case is 'cafes/restaurants'.

Figure 6.5 Coromandel IPA Matrix



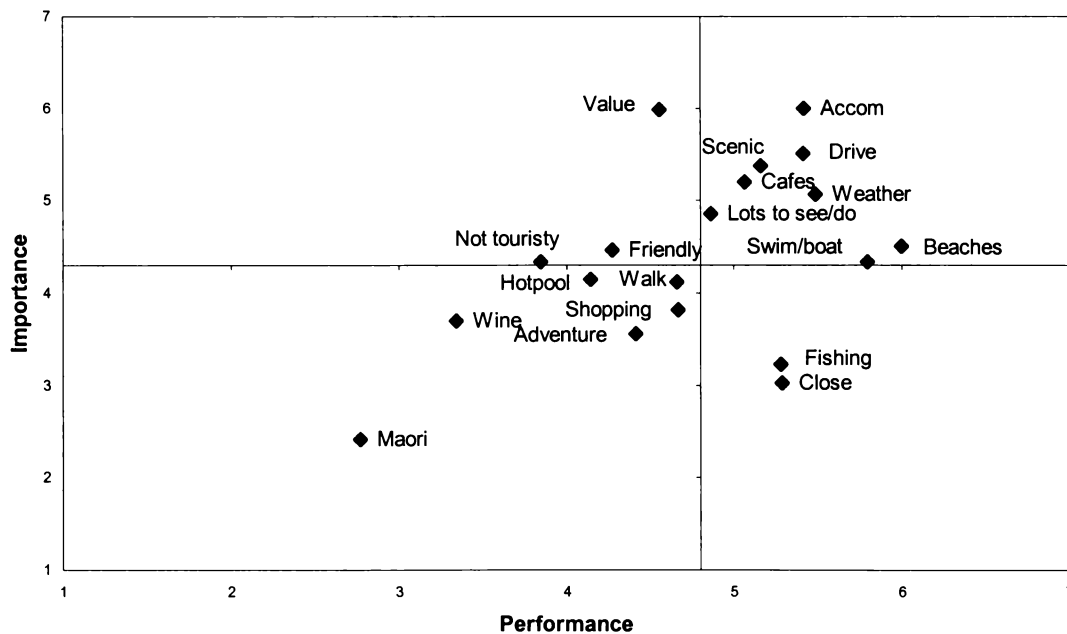
## Mount Maunganui IPA

The Cronbach alpha for the Mount Maunganui performance items is .90. Table 6.9 shows the perceived performance of Mount Maunganui. 'Snow sports' is not included. Mount Maunganui's highest performing attribute is 'ocean beaches' (6.0), which ranks eighth in importance (4.5). Only three performance means are below the scale mid-point. Paired-samples t-tests indicate significant differences in importance and performance of 14 attributes. Figure 6.6 shows the IPA Matrix for Mount Maunganui. Of the 11 determinant attributes, three are plotted in Quadrant 1, while eight are plotted in Quadrant 2. Mount Maunganui is positively differentiated from Rotorua by three attributes: 'good weather', 'ocean beaches' and 'places for swimming/boating'. Rotorua is positively differentiated by one determinant attribute, 'good value'.

**Table 6.9 Mount Maunganui Performance**

Attribute importance	Rank	Mean	Std	n	Perf Rank	Mea n	Std	n	Difference	t-Statistic	n	Sig
Good ocean beaches	8	4.50	1.82	747	1	6.0	1.23	735	1.50	-19.475	719	.000
Places for swimming or boating	10	4.34	1.92	741	2	5.80	1.30	726	1.46	-17.122	708	.000
Good weather	6	5.07	1.49	752	3	5.49	1.13	744	0.58	-7.144	734	.000
Suitable accommodation	1	5.99	1.20	753	4	5.42	1.21	703	-0.57	15.136	714	.000
Comfortable drive from home	3	5.50	1.42	755	5	5.41	1.48	747	-0.09	0.914	740	.361
Close to other holiday destinations	18	3.02	1.74	696	6	5.29	1.36	720	2.27	-29.480	660	.000
Fishing	17	3.23	2.11	662	7	5.28	1.54	629	2.05	-19.639	563	.000
Natural scenic beauty	4	5.37	1.40	756	8	5.16	1.23	740	-0.21	3.293	733	.001
Good cafes/ restaurants	5	5.20	1.62	746	9	5.06	1.31	708	-0.14	1.748	693	.081
Lots to see and do	7	4.85	1.51	747	10	4.86	1.42	733	0.01	-0.010	719	.992
Shopping	14	3.82	1.75	714	11	4.67	1.44	697	0.85	-11.618	662	.000
Places for walking/ tramping	13	4.11	1.86	734	12	4.66	1.49	686	0.55	-6.079	666	.000
Good value for money	2	5.99	1.29	752	13	4.56	1.32	681	-1.43	22.758	672	.000
Adventure activities	16	3.56	1.73	711	14	4.42	1.43	656	0.86	-9.749	619	.000
Friendly locals	9	4.46	1.74	742	15	4.27	1.40	666	-0.19	3.151	652	.002
Hot pool bathing	12	4.15	1.77	721	16	4.14	2.02	563	-0.10	0.985	543	.325
Not too touristy	11	4.34	1.76	746	17	3.85	1.3	730	-0.49	5.516	713	.000
Wineries	15	3.79	1.93	704	18	3.34	1.82	498	-0.45	9.799	489	.000
Maori culture experiences	20	2.41	1.63	663	19	2.77	1.57	476	0.36	-2.493	433	.013
<b>GRAND MEAN</b>		<b>4.38</b>	<b>0.86</b>	<b>763</b>		<b>4.72</b>	<b>0.90</b>	<b>750</b>				

**Figure 6.6 Mount Maunganui IPA Matrix**



## Taupo IPA

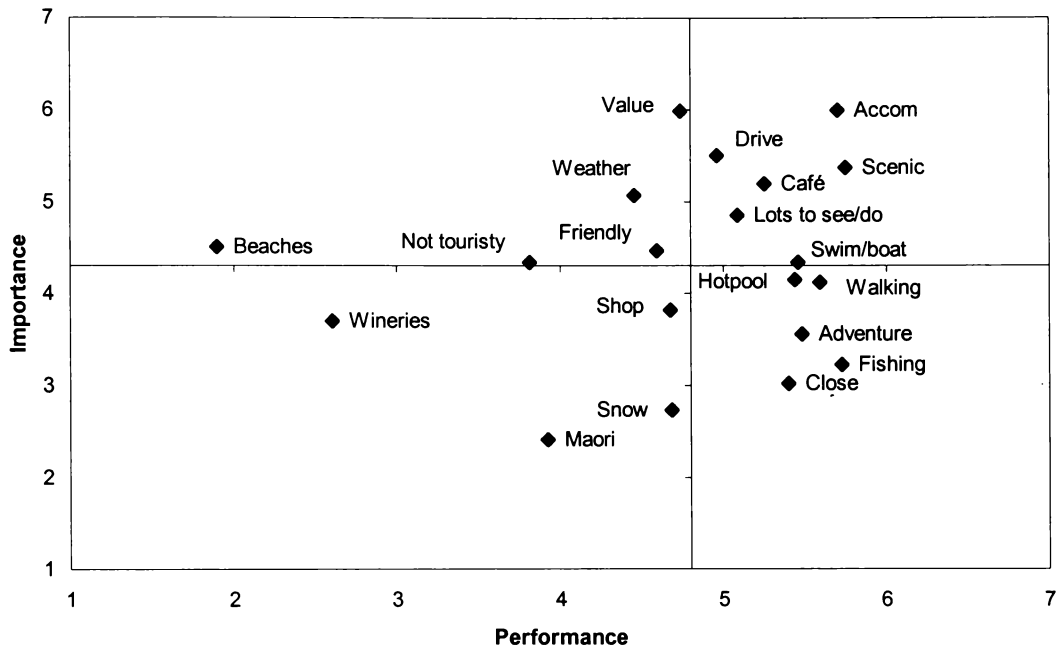
The Cronbach alpha for the Taupo performance items is .89. Table 6.10 shows the perceived performance of Taupo, in comparison to each attribute's importance. 'Snow sports' is included for analysis, given Taupo's proximity to the Whakapapa and Turoa ski fields. As with the Bay of Islands and Coromandel, Taupo's highest performing attribute is 'natural scenic beauty' (5.75), which ranks fourth in importance (5.37). Only four attribute performance means are lower than the scale mid-point, two of which only marginally so. Paired-samples t-tests indicate significant differences between importance and performance in 18 of the 20 attributes.

**Table 6.10 Taupo Performance**

Attribute importance	Rank	Mean	Std	n	Perf. Rank	Mean	Std	n	Diff	t-Statistic	n	Sig
Natural scenic beauty	4	5.37	1.40	756	1	5.75	1.22	751	0.38	-6.392	744	.000
Fishing	17	3.23	2.11	662	2	5.73	1.42	698	2.50	-24.898	613	.000
Suitable accommodation	1	5.99	1.20	753	3	5.70	1.15	732	-0.29	5.895	723	.000
Places for walking/tramping	13	4.11	1.86	734	4	5.59	1.29	729	1.48	-19.905	707	.000
Adventure activities	16	3.56	1.73	711	5	5.48	1.26	725	1.92	-24.463	680	.000
Places for swimming or boating	10	4.34	1.92	741	6	5.46	1.45	739	1.12	-13.372	720	.000
Hot pool bathing	12	4.15	1.77	721	7	5.44	1.63	667	1.29	-14.975	640	.000
Close to other holiday destinations	18	3.02	1.74	696	8	5.40	1.40	746	2.38	-30.613	683	.000
Good cafes/restaurants	5	5.20	1.62	746	9	5.25	1.27	733	0.05	-0.559	721	.576
Lots to see and do	7	4.85	1.51	747	10	5.09	1.40	747	0.24	-3.337	732	.001
Comfortable drive from home	3	5.50	1.42	755	11	4.96	1.68	754	-0.54	6.745	746	.000
Good value for money	2	5.99	1.29	752	12	4.74	1.30	717	-1.25	20.063	707	.000
Snow sports	19	2.74	1.90	634	13	4.68	2.13	642	1.94	-16.821	550	.000
Shopping	14	3.82	1.75	714	14	4.67	1.46	717	0.85	-11.203	677	.000
Friendly locals	9	4.46	1.74	742	15	4.59	1.33	699	0.13	-0.919	684	.358
Good weather	6	5.07	1.49	752	16	4.46	1.35	748	-0.61	9.162	737	.000
Maori culture experiences	20	2.41	1.63	663	17	3.92	1.75	572	1.51	-15.967	512	.000
Not too touristy	11	4.34	1.76	746	18	3.81	1.59	741	-0.51	6.033	724	.000
Wineries	15	3.79	1.93	704	19	2.60	1.57	460	-1.19	12.939	439	.000
Good ocean beaches	8	4.50	1.82	747	20	1.89	1.72	566	-2.61	25.680	559	.000
<b>GRAND MEAN</b>		<b>4.38</b>	<b>0.86</b>	<b>763</b>		<b>4.84</b>	<b>0.88</b>	<b>756</b>				

Figure 6.7 shows the IPA Matrix for Taupo. Of the 11 determinant attributes, five are plotted in Quadrant 1, while six are plotted in Quadrant 2. In Quadrant 2, Taupo is differentiated from Rotorua on one attribute, 'places for swimming/boating'. Once again, Rotorua is only differentiated by one determinant attribute, 'good value'.

**Figure 6.7 Taupo IPA Matrix**



## Destination Rankings

Table 6.11 shows the destination rankings for each of the 20 attributes, which are based on the mean scores. A more detailed version is tabled in Appendix D. Clearly, two destinations dominate these rankings. Rotorua and Coromandel account for top ranking in 16 of the 20 attributes. These two destinations also achieve top ranking in 10 of the 11 determinant attributes. Coromandel has top ranking in 6 of the 11 determinant attributes, while Rotorua has top ranking in four.

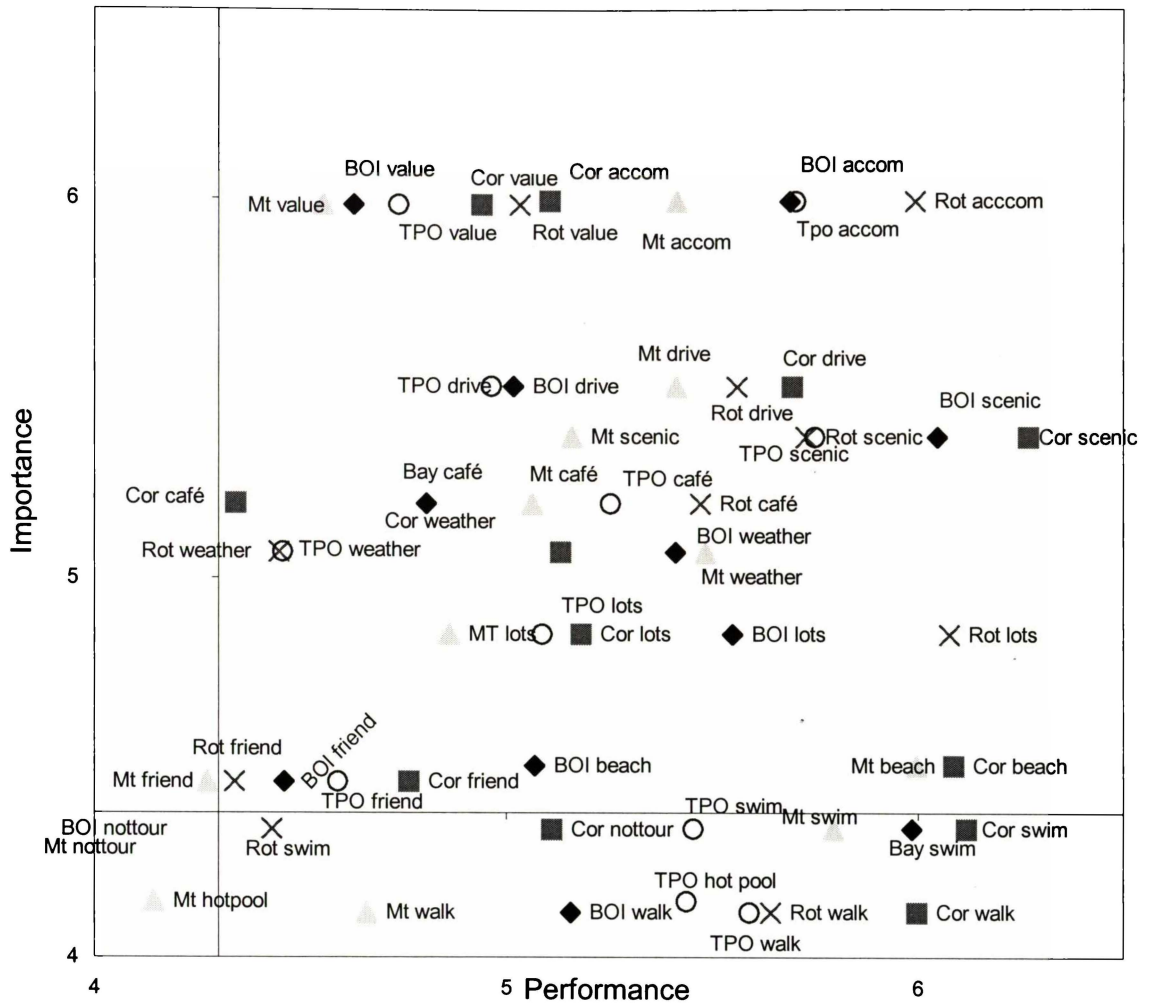
**Table 6.11 Destination Performance Ranking**

Attribute	Importance Mean	Bay of Islands	Coromandel	Mount Maunganui	Rotorua	Taupo
Suitable accommodation	5.99	3 <sup>rd</sup>	5 <sup>th</sup>	4 <sup>th</sup>	1 <sup>st</sup>	2 <sup>nd</sup>
Good value for money	5.99	4	2	5	1	3
Within a comfortable drive	5.50	4	1	3	2	5
Natural scenic beauty	5.37	2	1	5	4	3
Good cafes/restaurants	5.20	4	5	3	1	2
Good weather	5.07	2	3	1	5	4
Lots to see & do	4.85	2	3	5	1	4
Ocean beaches	4.50	3	1	2	5	4
Friendly locals	4.46	3	1	5	4	2
Places for swimming or boating	4.34	2	1	3	5	4
Not too touristy	4.34	2	1	3	5	4
Hot pool bathing	4.15	5	4	3	1	2
Places for walking/tramping	4.11	4	1	5	2	3
Shopping	3.82	4	5	1	2	3
Wineries	3.79	3	2	1	5	4
Adventure activities	3.56	3	4	5	1	2
Fishing	3.23	2	1	4	5	3
Close to another holiday destination	3.02	4	5	3	1	2
Snow sports	2.74	5	4	3	2	1
Maori culture experiences	2.41	2	5	4	1	3

## Combined IPA Matrix

Of the 142 published destination image papers reviewed, only one example was found of an IPA matrix of multiple destinations. Oppermann (1996b) investigated the perceptions of 30 North American convention destinations, but limited the combined IPA matrix to three of these. Oppermann selected the top, middle and bottom ranked destinations. The performances of these were suitably diverse to highlight noticeable differences on the matrix. Figure 6.7 shows Quadrant 2 from the IPA of all five destinations. The combined matrix proves cumbersome as a positioning analysis tool. Likewise, Oppermann (1996b) did not provide any positioning summary.

Figure 6.8 IPA Matrix Quadrant 2 – All Destinations



## Factor-analytic IPA

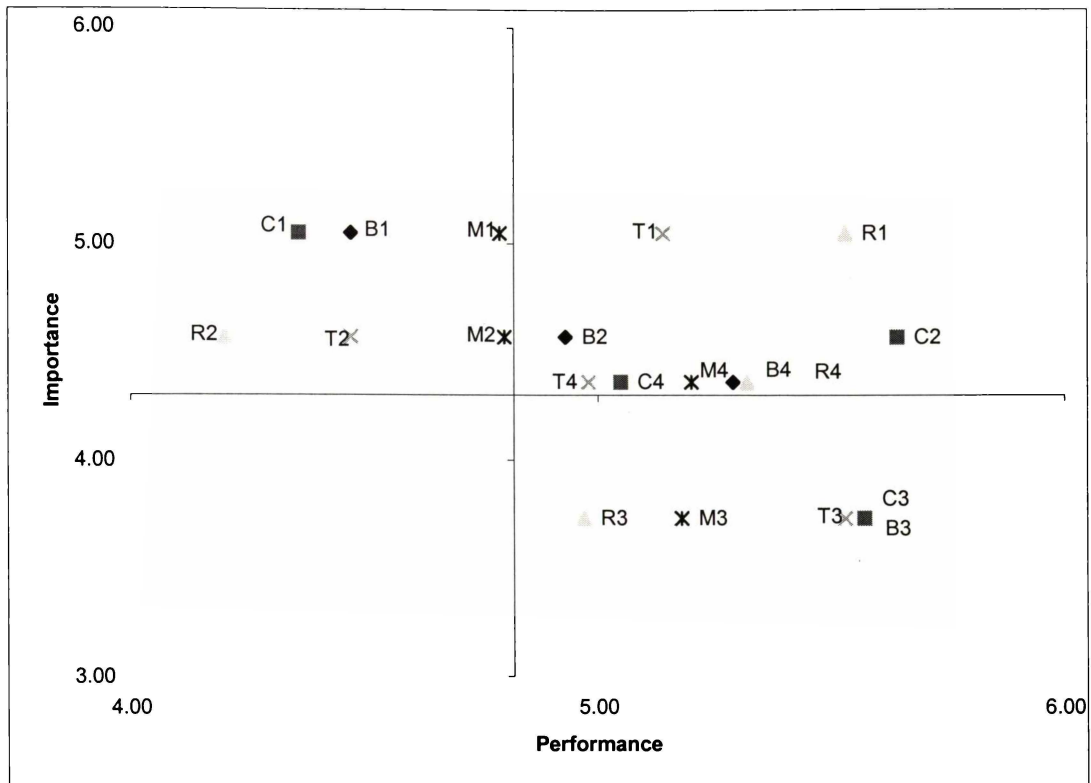
In an attempt to provide a more efficient and effective positioning analysis an IPA of factor scores has been used. O'Neill and Charters (2000) used the five SERVQUAL factors in an IPA of service quality at wineries cellar doors. Martin (1995) also used SERVQUAL factors in an IPA of hotel service, while Chu and Choi (2000) used factor scores in their IPA of hotel selection factors. However, no destination image applications of a factor analytic IPA were sourced. Table 6.12 summarises the mean importance scores for each of the four factors, as well as the mean performance ratings of each destination.

**Table 6.12 Factor Means**

Factor	Imp.	Bay of Islands	Coromandel	Mount Maunganui	Rotorua	Taupo
1. The good life	5.1	4.5	4.4	4.8	5.5	5.1
2. Getting away from it all	4.6	4.9	5.6	4.8	4.2	4.5
3. Outdoor action	3.7	5.6	5.6	5.2	5.0	5.5
4. The weather	4.4	5.3	5.1	5.2	5.3	5.0

Figure 6.9 presents the combined IPA for the five destinations, using the four factors. Cross hairs are plotted at the grand mean of all attributes, as per the individual matrices. The first letter of the destination along with the factor number codes each data point. For example, in Quadrant 2 nine points are present as strengths: Rotorua (R1) and Taupo (T1) on Factor 1, Coromandel (C2) and Bay of Islands (B2) on Factor 2, and all five destinations on Factor 4. This four-factor IPA provides a much clearer positioning analysis. In particular, two destination positions dominate the all-important Quadrant 2. The first is Rotorua's performance on Factor 1. This dimension is labelled 'The good life/infrastructure' and features five attributes: 'good cafes/restaurants', 'suitable accommodation', 'hot pool bathing', 'good value for money' and 'shopping'. Rotorua achieves top rank on the first four of these attributes, and ranks second for the fifth. The destination positioned most closely to Rotorua on this dimension is Taupo. Intuitively, this result appears reasonable, given the physical attributes and tourism features of the two settings.

**Figure 6.9 Four Factor IPA**



The second prominent position is Coromandel on Factor 2. This dimension is labelled 'Getting away from it all' and contains five attributes: 'places for walking/tramping', 'natural scenic beauty', 'not too touristy', 'ocean beaches' and 'friendly locals'. Coromandel ranks first for each of these. The destination positioned closest to Coromandel is Bay of Islands. Arguably, this is consistent with the geographical nature of the two destinations. The other dimension plotted in Quadrant 2 is Factor 4 - The Weather, which features three attributes: 'good weather', 'lots to see/do' and 'close to other destinations'. All five destinations are perceived to perform strongly on this factor, with no dominant position, although Rotorua ranks highest.

The remaining Factor 3 – Outdoor Play, which features 'places for swimming/boating', 'fishing', and 'adventure activities', is plotted in Quadrant 4. Each destination is perceived to perform strongly on this factor, which rates below the scale mid-point. Rotorua ranks lowest. The factor-analytic IPA demonstrates how two quite different destinations performed strongly on two quite different

factor dimensions. In Factor 1, which Rotorua dominates, Coromandel ranks 5<sup>th</sup>. Likewise, in Factor 2, which Coromandel dominates, Rotorua ranks 5<sup>th</sup>. The positions of the other three destinations are less clear.

## Multidimensional Scaling

Multidimensional scaling (MDS), the most popular positioning analysis procedure, is used to provide a comparison with the IPA output. The data was firstly converted to a two-way matrix summary of means following Goodrich (1978b) and Gartner (1989). This is shown in Table 6.13, and is referred to as a rectangular matrix of two-mode data since it is exploring the relationships between two sets of elements (Fenton and Pearce, 1988). Goodrich suggested each mean score represents a proximity measure, or level of association, between rows and columns. For example, 'lots to do' is perceived to be closer to Rotorua (6.08) than 'not too touristy' (2.96). 'Lots to do' is perceived to be closer to Rotorua (6.08) than to Mount Maunganui (4.86). 'Snow sports' was omitted from the analysis.

**Table 6.13 Summary of Means**

Attribute	Bay of Islands	Coromandel	Mount Maunganui	Rotorua	Taupo
Drive	5.02	5.69	5.41	5.56	4.96
Weather	5.41	5.13	5.49	4.45	4.46
Lots	5.55	5.18	4.86	6.08	5.09
Touristy	3.87	5.11	3.85	2.96	3.81
Beaches	5.07	6.09	6.00	1.63	1.89
Scenic	6.05	6.27	5.16	5.73	5.75
Swim/boat	5.98	6.12	5.80	4.43	5.46
Fishing	5.90	5.91	5.28	4.71	5.73
Close	4.90	4.84	5.29	5.44	5.40
Walking	5.16	6.00	4.66	5.64	5.59
Friendly	4.46	4.76	4.27	4.34	4.59
Shopping	3.75	3.49	4.67	4.62	4.67
Adventure	4.84	4.71	4.42	5.73	5.48
Hot pools	2.89	3.82	4.14	6.54	5.44
Cafes	4.81	4.34	5.06	5.47	5.25
Accomm	5.69	5.11	5.42	5.99	5.70
Maori	4.30	2.65	2.77	6.37	3.92
Value	4.63	4.94	4.56	5.03	4.74
Wineries	3.00	3.09	3.34	2.57	2.60

ALSCAL was used, which was the SPSS 10.0 default MDS technique, which calculates Euclidean distances from the interval scales. It is customary for a trade-off to be made between the goodness of fit measure and the number of perceptual dimensions used. Goodness of fit improves with the number of dimensions. However, as the number of dimensions increases, the more difficult it is to interpret the results. Figure 6.10 presents the two-dimensional solution, which features a RSQ of .99594 and Stress of .02969. The r-squared measure explains the amount of variance accounted for, and is akin to a goodness of fit measure. Both are regarded as excellent, although this may have been an effect of a small number of brands used. It has been suggested the number of elements, less one, should be equal to or greater than quadruple the number of dimensions (Kruskal and Wish, 1978). For a two dimensional solution, a minimum of nine destinations would be required. However, other destination applications have used less, such as two dimensions involving four destinations (Gartner, 1989) and six destinations (Grabler, 1997a), and three dimensions involving eight destinations (Mayo, 1973).

Kruskal and Wish (1978) suggested MDS results are not likely to present any surprises. In this regard, familiarity with the destinations is an advantage in interpreting the dimensions for marketing strategy development (Gartner, 1989). A further point regarding the interpretation of the dimensions is the axes may be rotated to provide more meaning (Kruskal and Wish, 1978). Interpreting the meaning of the dimensions is difficult and subjective (Green and Carmone 1969, Gartner 1989). As with the four-factor IPA it is evident Rotorua and Coromandel occupy quite different positions. Taupo is again the closest to Rotorua, while Bay of Islands is closest to Coromandel. Mount Maunganui occupies a distinctive position in the middle. The x-axis dimension reflects 'lots to do' versus 'relaxing', with the more relaxing destinations tending to be costal areas. The y-axis dimension is more difficult to interpret. Figure 6.11 shows the one-dimensional plot, which also highlights proximities between the five destinations. The stress value is .07736 (RSQ = .98322).

Figure 6.10 MDS Perceptual Map

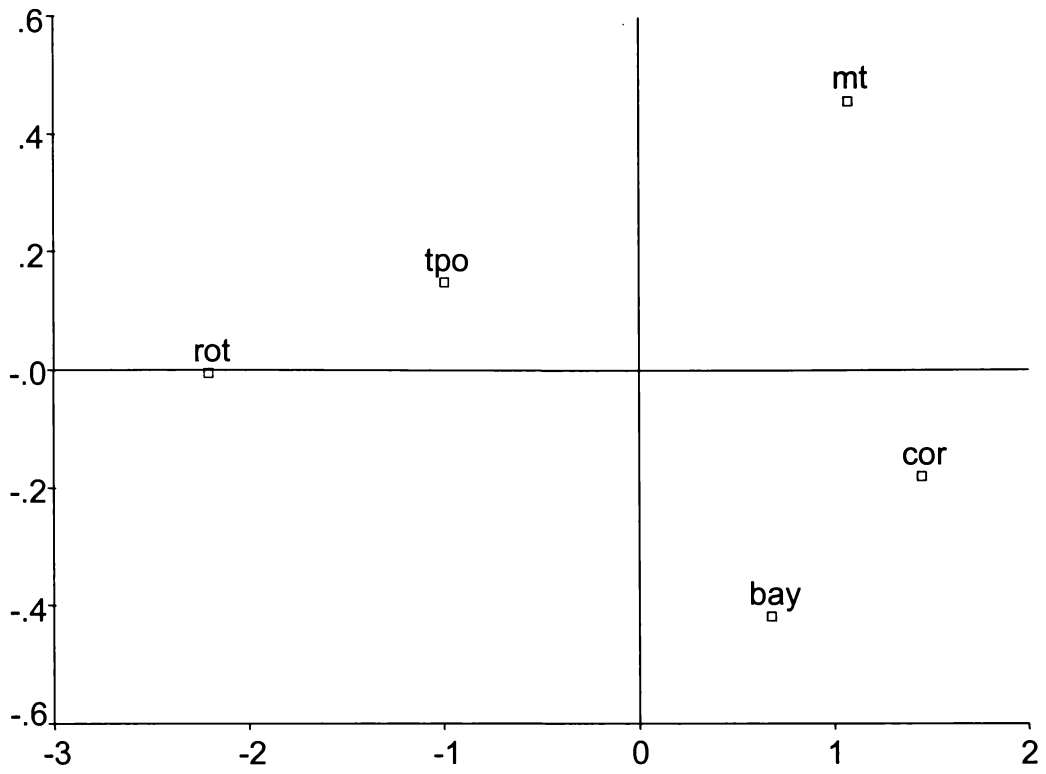
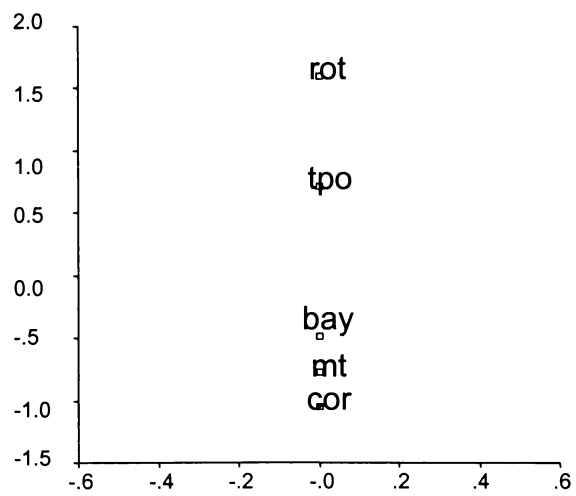


Figure 6.11 One Dimensional MDS Plot



## Affect Response Matrix

Cronbach alphas for the two affect items, for each of the destinations are .84 (Taupo), .82 (Rotorua), .80 (Mount Maunganui), .66 (Coromandel), and .61 (Bay of Islands). The two affect items are also correlated with each other, at the  $p < .001$  level, for each destination: Taupo ( $r = .72$ ), Rotorua ( $r = .69$ ), Mount Maunganui ( $r = .67$ ), Coromandel ( $r = .51$ ) and Bay of Islands ( $r = .44$ ). Table 6.14 shows the mean scores for each destination on the first affect item. This seven-point scale was anchored at 'Sleepy' (1) and 'Arousing' (7). All destinations' means are on the arousing side of the scale mid-point, with Rotorua rating highest and Coromandel lowest.

**Table 6.14 Affect 1 – Sleepy/Arousing**

Rank		N	Mean	Std.
1	Rotorua	756	5.3	1.1
2	Bay of Islands	756	4.9	1.1
3	Taupo	754	4.9	1.2
4	Mount Maunganui	747	4.8	1.3
5	Coromandel	756	4.6	1.4
	Grand mean	761	4.9	0.8

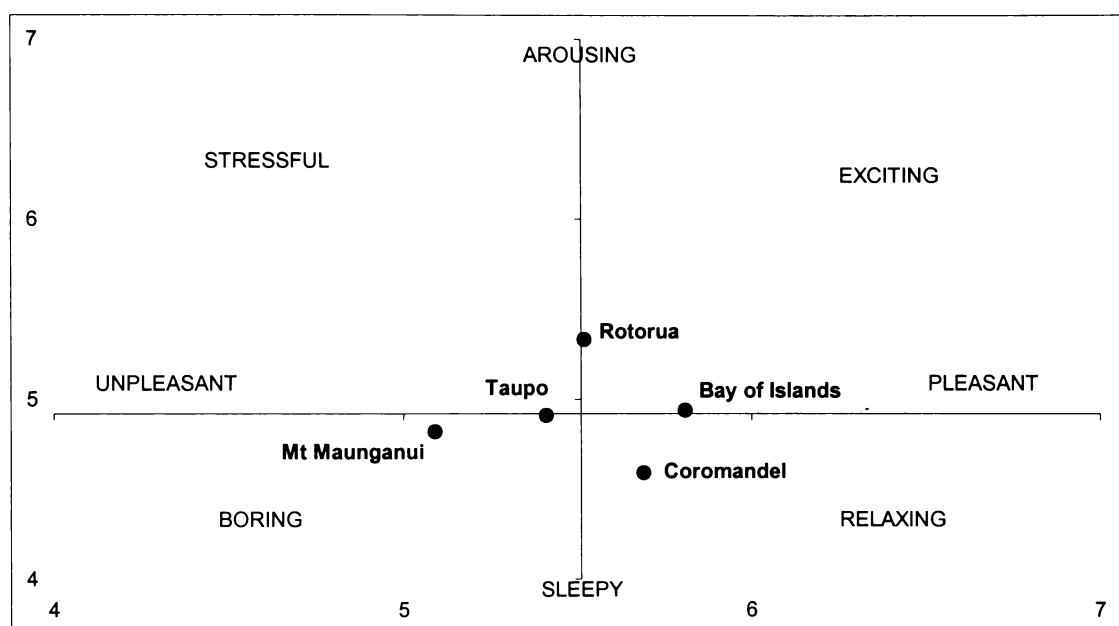
Table 6.15 presents the mean scores for each destination on the second affect item. This seven-point scale was anchored at 'Unpleasant' (1) and 'Pleasant' (7). Interestingly, given the strong performance in previous sections, Rotorua ranks third behind Bay of Islands and Coromandel. All destinations' means are above the scale mid-point. The grand mean is 5.5, which reflects positively on the five destinations and validates their selection.

**Table 6.15 Affect 2 – Unpleasant/Pleasant**

Rank		N	Mean	Std.
1	Bay of Islands	758	5.8	1.1
2	Coromandel	757	5.7	1.2
3	Rotorua	756	5.5	1.2
4	Taupo	752	5.4	1.7
5	Mount Maunganui	745	5.1	1.3
	Grand mean	762	5.5	0.8

The affect results have been plotted onto an affective response matrix, which is presented in Figure 6.11. If the scale mid-point (4) was used to place the cross-hairs, all destinations would be located in the arousing/exciting/pleasant dimension. Instead, the grand means are used to provide a guide to how each was positioned relative to the others for each dimension. 'Stressful' is used in place of 'Distressing', while 'Boring' is used in place of 'Gloomy'. Rotorua is positioned closest to three poles: 'Stressful', 'Arousing' and 'Exciting', while Coromandel is positioned closest to 'Sleepy' and 'Relaxing'. The affective response matrix appears a mirror image of the MDS perceptual map.

**Figure 6.12 Affective Response Matrix**



### **Affect and Motivation**

It has been suggested that motivation, based on benefits sought, is related to affect towards a destination (Dann 1996a, Gartner 1993, Walmsley and Jenkins 1993). In this case, while there are a number of correlations, they are weak. The strongest correlation is between 'to educate my children' and Rotorua 'sleepy/arousing' ( $r = .2, p < .001, n = 391$ ).

## Affect and Cognition

Rosenberg (1956) found affect to be a function of an individual's cognitive evaluation of an object. Relatively few destination image studies have analysed the effect of cognition and affect. Recent exceptions have included Baloglu and McCleary (1998), Dann (1996a) and Mackay and Fesenmaier (1997). Table 6.16 presents the correlations between the performance of each destination on individual attributes and the affect items, which are significant at the  $p < .01$  level. The strongest correlations are for seven attributes: 'lots to do', 'natural scenic beauty', 'friendly locals', 'shopping', 'cafes/restaurants', 'suitable accommodation', and 'good value for money'. Four of these are part of Factor 1 and two are included in Factor 2.

**Table 6.16 Affect and Destination Performance**

Perf	Bay Aff 1	Bay Aff 2	Cor Aff 1	Cor Aff 2	Mt Aff 1	Mt Aff 2	Rot Aff 1	Rot Aff 2	Tpo Aff 1	Tpo Aff 2
Drive	.2	.2	.2	.3	.3	.4	.3	.4	.3	.4
Weather	.2	.3	.3	.3	.4	.4	.3	.4	.4	.4
Lots	.4	.5	.5	.5	.6	.5	.5	.4	.6	.6
Touristy	.2	.2	.2	.4	.2	.4	.2	.3	.2	.3
Beach	.3	.4	.2	.4	.3	.3	.1		.2	
Scenic	.3	.4	.3	.5	.4	.5	.4	.5	.4	.5
Swim	.2	.3	.2	.4	.4	.4	.2	.3	.3	.4
Fish	.2	.3	.1	.3	.3	.3	.2	.3	.2	.3
Close	.3	.3	.3	.2	.4	.3	.3	.4	.3	.4
Walk	.2	.3	.2	.4	.4	.4	.3	.4	.3	.4
Friendly	.3	.3	.3	.4	.4	.5	.3	.4	.4	.5
Shopping	.3	.3	.3	.2	.5	.4	.4	.5	.5	.5
Adventure	.3	.3	.4	.3	.4	.4	.4	.4	.4	.4
Hot pool	.1		.2		.4	.4	.2	.2	.3	.3
Cafes	.4	.4	.4	.3	.5	.5	.5	.5	.5	.5
Accomm	.4	.4	.4	.4	.5	.5	.4	.5	.5	.5
Maori		.1			.2	.2	.2	.2	.3	.2
Value	.4	.4	.4	.5	.5	.5	.5	.5	.6	.6
Wineries	.2	.2	.1		.2	.2	.2	.2	.2	.2

Table 6.17 shows the correlations between attribute performance sum for each destination and the affect means. In all cases the correlations are significant at the  $p < .01$  level.

**Table 6.17 Affect and Attribute Performance Sum**

<b>Attribute Sum</b>	<b>Sleepy/Arousing</b>	<b>Unpleasant/Pleasant</b>
Bay of Islands	.4	.4
Coromandel	.4	.4
Mount Maunganui	.6	.6
Rotorua	.5	.6
Taupo	.6	.6

### **Affect and Conation**

Conation was measured by asking respondents to indicate their likelihood of visiting each destination within the next twelve months. A seven-point scale was used, anchored at 'Definitely not' (1) and 'Definitely' (7). Baloglu and Brinberg (1997) proposed the affective scales could be used to predict or explain intent to visit destinations. Table 6.18 shows the correlations between intent to visit each destination and affect. All are significant at the  $p < .01$  level.

**Table 6.18 Affect and Intent to Visit**

<b>Intent to visit</b>	<b>Sleepy/Arousing</b>	<b>Unpleasant/Pleasant</b>
Bay of Islands	.3	.3
Coromandel	.3	.4
Mount Maunganui	.4	.5
Rotorua	.3	.4
Taupo	.5	.4

## **RTO Feedback**

Since one of the thesis' goals is to test the efficacy of IPA as a tool for helping RTOs develop an improved understanding of their destination's market positioning, it was important to gain feedback from industry on the value of the data. The RTOs from each of the five regions were offered a presentation of the IPA results. At each meeting, a 30-minute presentation was given, which included a description of the IPA method and a focus on the key results for that particular destination. In this way the strengths and weaknesses of the other four destinations were not discussed.

The first presentation was made to Tourism Rotorua's 'Domestic Portfolio Group' on March 14<sup>th</sup>, 2001. The group is a sub-committee of the Rotorua Tourism Advisory Board, and is responsible for an annual domestic marketing budget of approximately \$180,000 (Ruth Goldsbury, Tourism Rotorua Domestic Marketing Manager, Personal Communication, April 2001). Members of the group include representatives from hotels, motels, backpackers, retail, visitor attractions, home stays and cafes/restaurants. Tourism Rotorua's domestic marketing manager facilitates the group. The presentation was scheduled to coincide with the group's strategy planning session for the 2001/2002 financial year.

A meeting with Tourism Coromandel's board was held on March 21<sup>st</sup> 2001, at Whangamata. Board members included representatives from three local authorities, Iwi (1), tourism industry (3), and the Department of Conservation. Tourism Coromandel's CEO and marketing co-ordinator were also present.

Since the research involved perceptions of the Bay of Islands, rather than the entire Northland region, a meeting with nine Bay of Islands members of Destination Northland was held on March 23<sup>rd</sup> 2001, at Paihia. Those present represented key accommodation and activities operators, Iwi, and the Historic Places Trust. Destination Northland's CEO and marketing manager were also present. The Destination Northland CEO advised the timing of the presentation was significant given its usefulness in the development of a "major domestic

promotion which will take place in 2001" (Bryan Roberts, Personal Communication, March 2001).

A meeting with the manager of Destination Lake Taupo, Paul Yeo, was held on March 28<sup>th</sup>, at Taupo. The meeting coincided with a key planning period for the organisation.

At the time the offer was made to Tourism Bay of Plenty, the organisation was in the process of handing over responsibility for destination marketing to its primary funding agency, Tauranga District Council. This change took place on March 1<sup>st</sup>, 2001. Tauranga District Council's projects co-ordinator Max Mason advised that a review of the function and funding of destination marketing was being undertaken, prior to designing and implementing a new RTO structure (Personal communication, February 2001). During the interim period a former marketing manager of Destination Lake Taupo, was appointed on a temporary contract to handle operational issues. Also, at the time of the presentation offer, Tauranga District Council was about to launch a \$75,000 print advertising campaign in the Auckland/Waikato regions.

In lieu of an active RTO, a presentation was made to the Tauranga District Council's 'Visitor Industry Management Group', which was an interim body established to facilitate the new RTO structure. Members included the Mayor, Deputy Mayor and senior council staff. Also, at the author's request, a small number of local tourism operators were invited. The presentation took place on August 1<sup>st</sup>, two weeks prior to the council meeting that was to confirm the new RTO funding and structure. With the benefit of hindsight, this meeting proved the least productive, since this was not a group making actual marketing decisions.

Prior to this, at the invitation of the Bay of Plenty Times, two columns on the thesis' implications for Tauranga's new RTO strategy/structure were published (see Bay of Plenty Times 14/5/01 and 21/5/01). This resulted in a request from Mount Maunganui's Mainstreet organisation for a presentation. A presentation to a

group of 30 members was made on October 16<sup>th</sup>, 2001. Those present were predominantly retailers.

At the conclusion of each meeting, feedback was sought on the value of the data for future domestic marketing planning. Each of the six groups advised the results represented the first research into the domestic short break holiday market for their region:

*Very usable results, good to highlight the consumers perceived strengths and weaknesses of Rotorua rather than what we (locals) perceive our strengths and weaknesses to be.*

Some commented on the lack of domestic travel research in general. Even the most comprehensive domestic research for a decade by Forsyte Research (2000) was criticised, constructively, by two of the RTOs. One of the complaints was that research was based on provincial regions, and not necessarily related to destinations such as Taupo or Rotorua, which came under the Bay of Plenty region.

Each group appeared to follow the IPA logic and graphics:

*The IPA will be of use particularly in identifying attributes with a high importance but a lower than anticipated performance – these are areas we may place more emphasis on in future marketing.*

The groups endorsed the value of the technique as a practical decision making tool:

*Its value outside of academia is undisputed for anyone in business, particularly retailers, media and advertising. For TR (Tourism Rotorua) it's very interesting considering Auckland is our largest market and uncovering not only why they come here, but also what's important to them when choosing a short break holiday.*

The opportunity to benchmark for image tracking was also raised:

*It would be something that I think I would be happy to pay for as a tool to make decisions if there was a measure over two blocks of time.*

Several Mount Maunganui retailers were defensive about the relatively poor showing of that destination in comparison to the four other destinations.

*That can't be right (the 'Friendly locals' ranking) because I had someone in my shop the other day commenting on how friendly I was!*

Few of the other results were openly challenged at the other meetings, although in Rotorua two participants had difficulty with the accommodation importance. Ironically one of these was an accommodation representative:

*(It's ) hard to believe that accommodation is a driving factor.*

However, this result is consistent with Chon, Weaver and Kim's (1991) domestic short break study in the USA, which also found accommodation to be the top-rating attribute. Also, Ryan (1983) cited an English Tourist board finding that 'clean and comfortable accommodation' most important for second holidays.

More than one RTO commented that some of the results confirmed gut feelings while others represented new information:

*It identified two new communication messages we should use.*

One of the groups suggested the results supported some of the findings in a PATA taskforce report for the destination, which had been produced a decade earlier. Another RTO commented that the 'Wineries' result was of interest as a recent in-house study had indicated this was something visitors would like to see at the destination. One of the other RTOs was particularly interested in the future

tracking of winery importance and performance given the recent investment in winery development there.

A key recommendation made at each of the meetings was to more explicitly promote short break options. Each group confirmed they had not previously targeted this travel segment. As a result, Tourism Rotorua's domestic marketing manager later advised the results had been used in the design of Tourism Rotorua's 2001 domestic television advertising campaign (Personal communication, August 2001). Also, based on the results, a two week television advertising campaign promoting Tauranga a short break destination was launched in February 2002 (Max Mason, Personal Communication, February 2002).

## **Chapter Summary**

The chapter presents the importance ratings of 20 attributes, and the performance ratings for each of the five competing destinations. These results are then presented in the form of IPA matrices, which highlight the strengths and weaknesses of each destination. The IPA identifies 11 determinant attributes. Performance rankings for each destination, relative to the competition, are also summarised. Rotorua and Coromandel dominate the performance rankings in the determinant attributes

These results are similar to the synthesis of attributes reported in the literature, particularly in the 39 papers that had recommended determinant attributes or factors. A comparison between attribute rankings in the thesis and the 39 papers is highlighted in Table 6.19. This also supports the assertion that some attributes are universally important, while some will be situation specific. The importance of 'a comfortable drive from home', 'good ocean beaches', 'places for swimming and boating' and 'a place that is not too touristy' represent specific aspects of the New Zealand way of life.

**Table 6.19 Comparison of Attribute Determinance**

Determinant Attributes	Thesis Rank	Literature Rank
Suitable accommodation	1	9
Good value for money	2	3
A comfortable drive from home	3	
Natural scenic beauty	4	1
Good cafes/restaurants	5	11
Good weather	6	4
Lots to see and do	7	8
Good ocean beaches	8	
Friendly locals	9	6
Places for swimming or boating	10	
A place that is not too touristy	11	

While the IPA matrices are effective in highlighting strengths and weaknesses at the individual destination level, the combined IPA matrix is cumbersome as a competitive positioning analysis tool. For example, Rotorua appears to have an inferior performance in terms of the number of attributes positioned in Quadrant 2. This is reflected in the strong performance of the destinations across almost all attributes. On average each destination has only four attribute performance means below the scale mid-point. In this regard, Hunt's (1975) study of four USA states found that respondents rated geographically close destinations' performances similar on important attributes.

While Rotorua is only positively differentiated from each of the other destinations by one attribute, in the case of three destinations the attribute is 'good value for money'. This is a powerful differentiator, and may relate to Rotorua's intense accommodation competition, where an over-supply of rooms has led to price based competition that is not seen on such a scale in the other destinations. The long term implication of this is that this is likely to be a continuing cycle for Rotorua, where low prices will lead to increased visitors and therefore occupancy and therefore tariff increases and therefore new investment in additional rooms. This will lead to oversupply and priced based competition.

An exploratory factor analysis reduces the 20 attributes into four key dimensions. From this analysis a four-factor IPA Matrix has been produced, which clearly identifies strong and differentiated positions held by Rotorua and Coromandel. Rotorua's performance as unaided ToMA destination and decision set

membership is a function of the importance of, and perceived performance across, the five attributes in Factor 1 'The good life/infrastructure': 'cafes/restaurants', 'suitable accommodation', 'shopping', 'hot pool bathing' and 'value for money'.

The chapter also presents the results of MDS, in a further effort to identify the competitive position of Rotorua. MDS and factor analysis often produce similar results (Grabler, 1997a). The MDS map output supports the four-factor IPA results. MDS has the advantage of producing a map of the difference/similarity distances, while the factor analysis helped to explain the dimensions.

The results of the two affect items for each destination are used to generate an affective response matrix. As with the four-factor IPA solution and MDS perceptual map, Rotorua and Coromandel are positioned quite differently. Rotorua is perceived to be most 'arousing', while Coromandel is most 'relaxing' of the five destinations. The affective image of each destination is correlated with performance on cognitive attributes as well as intent to visit. However, affect has a minimal association with the motivation scales.

Preliminary results were presented to the five RTOs, as well as one business association, with each confirming the data represented the first for their destination on the Auckland short break holiday market. Each commented on the value of the IPA as a tool to identify strengths and weaknesses, as well as the value of the results for future domestic marketing planning. Evidence was provided of the subsequent use of the results in RTO promotions. Table 6.20 provides a snapshot summary of the five destinations' comparative performances across key items. The summary highlights the strong performances of Rotorua and Coromandel.

**Table 6.20 Summary of Destination Performance**

	<b>Bay of Islands</b>	<b>Coromandel</b>	<b>Mt Maunganui</b>	<b>Rotorua</b>	<b>Taupo</b>
ToMA choice	13.0% (4 <sup>th</sup> )	14.5% (2 <sup>nd</sup> )	8.3% (5 <sup>th</sup> )	24.1% (1 <sup>st</sup> )	13.1% (3 <sup>rd</sup> )
Decision set	52.7% (3 <sup>rd</sup> )	58.6% (2 <sup>nd</sup> )	34.4% (5 <sup>th</sup> )	61.9% (1 <sup>st</sup> )	48.5% (4 <sup>th</sup> )
Rankings for determinant attributes					
1 <sup>st</sup>	0	6	1	4	0
2 <sup>nd</sup>	5	1	1	1	3
3 <sup>rd</sup>	3	2	4	0	2
4 <sup>th</sup>	3	0	1	2	5
5 <sup>th</sup>	0	2	4	4	1
Affect Sleepy – Arousing	4.9 (2 <sup>nd</sup> )	4.6 (5 <sup>th</sup> )	4.8 (4 <sup>th</sup> )	5.3 (1 <sup>st</sup> )	4.9 (3 <sup>rd</sup> )
Affect Unpleasant – Pleasant	5.8 (1 <sup>st</sup> )	5.7 (2 <sup>nd</sup> )	5.1 (5 <sup>th</sup> )	5.5 (3 <sup>rd</sup> )	5.4 (4 <sup>th</sup> )
Intent to visit – all respondents	4.5 (3 <sup>rd</sup> )	4.8 (1 <sup>st</sup> )	4.1 (5 <sup>th</sup> )	4.7 (2 <sup>nd</sup> )	4.4 (4 <sup>th</sup> )
Intent to visit – ToMA group	5.5 (3 <sup>rd</sup> =) n = 97	5.7 (1 <sup>st</sup> ) n = 107	5.2 (5 <sup>th</sup> ) n = 62	5.6 (2 <sup>nd</sup> ) n = 177	5.5 (3 <sup>rd</sup> =) n = 98

A summary of Rotorua's resources representing potential sources of comparative advantage in the domestic short break market is provided in Table 6.21. Barney's (1996) VRIO model is used. The resources are listed based on the destination resources categorisation proposed in Chapter 2. While the ratings are subjective they do point to a number of temporary sources of advantage. It is suggested Tourism Rotorua is not organised to take advantage of these. The reasons for this assertion are the lack of campaigns targeting the short break travel segment, the applicability of the destination strapline and the lack of domestic market research undertaken during the period of the thesis.

**Table 6.21 Rotorua's Sources of Comparative Advantage**

Resource	Category	Valuable?	Rare?	Inimitable?	Organised?	Status
ToMA	Goodwill	✓	✓	✓		TCA
Accommodation	Developed	✓	✓	✓		TCA
Lots to see/do	Developed/Natural	✓	✓	✓		TCA
Good value	Goodwill/Financial	✓	✓	✓		TCA
Factor 1 items	Developed	✓	✓	✓		TCA
Good cafes	Developed	✓	✓			TCA
Affect 1 - Arousing	Developed	✓	✓			TCA
Hot pool bathing	Developed	✓				CP
Adventure activities	Developed/Natural	✓				CP
Close to other destinations	Natural	✓				CP
Decision sets	Goodwill	✓				CP
Conation	Goodwill	✓				CP
Maori culture	Culture/Human	X				
Fishing	Natural	X				

**Key:**

**CP denotes competitive parity**

**TCA denotes temporary competitive advantage**

# Chapter 7 – Perceptual Differences

This chapter presents the results of an exploration of perceptual differences between different groups of respondents within the sample. As discussed previously, the characteristics of Aucklanders with a propensity for short break holidays have not previously been identified. The intent is to identify groups warranting targeted promotions, since Auckland is a large diverse region and costly to reach in its entirety. The questionnaire was mailed to a random sample of Auckland households, rather than distributed to visitors at a destination. It is felt this would facilitate the capture of previous visitors as well as those who had chosen not to visit each of the five destinations. This enables an analysis of perceptual differences between the two groups. Also, the results of cluster analysis are presented, in an attempt to identify key short break segments. Finally, the characteristics and perceptions of respondents who selected Rotorua as their destination are examined and compared to the other respondents.

## Perceptual Differences between Non-visitors and Previous Visitors

Respondents indicate a high level of visitation to all five destinations. As shown in Table 7.1, visitation ranges from a high of 98.3 per cent for Rotorua to a low of 87.8 per cent for Mount Maunganui. This validates the destination performance results, due to respondents' familiarity with the five destinations.

**Table 7.1 Previous Visitation**

	<b>N</b>	<b>Visitors</b>	<b>Valid %</b>	<b>Non-visitors</b>	<b>Valid</b>	<b>Missing</b>
Rotorua	754	741	98.3%	13	1.7%	9
Taupo	753	726	96.4%	27	3.6%	10
Bay of Islands	759	718	94.6%	41	5.4%	4
Coromandel	758	717	94.6%	41	5.4%	5
Mt Maunganui	754	662	87.8%	92	12.2%	9

Independent-samples *t*-tests indicate no significant differences in perceptions of Rotorua's performance between previous visitors ( $n = 741$ ) and non-visitors ( $n = 13$ ). The low level of non-visitation is unexpected, since two surveys commissioned by Tourism Rotorua in Auckland (see Media One 1993, APR 1995) both reached a 50:50 ratio of previous visitors and non-visitors. However, the

thesis result is consistent with a recent study by Moore, Fairweather and Simmons (2000) whose small sample of visitors to Rotorua (n = 238) contained only one participant who was a first time visitor. Almost 70 per cent of their sample had visited Rotorua four or more times.

Mount Maunganui has the largest number of non-visitors (n = 92). As shown on Table 7.2, Mount Maunganui's performance is rated higher by previous visitors for 10 cognitive attributes. Non-visitors perceive the performance of only one attribute to be higher. Previous visitors find Mount Maunganui more 'arousing' and 'pleasant'. Also, intent to visit Mount Maunganui is higher for previous visitors. The mean intent to visit for non-visitors is below the scale mid-point.

**Table 7.2 Perceived Differences in Mt Maunganui's Performance**

	Visitors	Mean	Std.	Non visitors	Mean	Std.	t	Sig
Comfortable drive	660	5.5	1.4	80	4.7	1.7	5.036	.000
Weather	658	5.6	1.1	79	4.9	1.3	4.636	.000
Ocean beaches	655	6.1	1.2	73	5.4	1.6	4.739	.000
Swimming/boating	647	5.9	1.3	72	5.2	1.6	3.895	.000
Fishing	560	5.4	1.5	63	4.5	1.8	4.362	.000
Close to other dest's	641	5.4	1.3	73	4.8	1.5	3.500	.000
Shopping	623	4.8	1.4	67	3.9	1.3	4.966	.000
Cafes/restaurants	635	5.1	1.3	66	4.5	1.3	4.050	.000
Accommodation	625	5.5	1.2	72	4.9	1.5	3.939	.000
Value for money	615	4.6	1.3	60	4.2	1.4	2.116	.035
Maori culture	423	2.7	1.6	49	3.3	1.7	-2.529	.012
Sleepy/Arousing	660	4.9	1.2	80	4.3	1.5	4.131	.000
Unpleasant/Pleasant	660	5.2	1.3	79	4.3	1.5	5.696	.000
Intent to visit	657	4.2	1.4	89	3.4	1.4	4.554	.000

As shown in Table 7.3, previous visitors perceive the Coromandel more favourably for five cognitive attributes. Non-visitors perceive the performance for only one attribute more positively. Also, Coromandel is perceived to be more 'pleasant' by previous visitors. Intent to visit is higher for previous visitors. Independent-samples *t*-tests indicate significant differences in perceptions of Bay of Island's performance for seven attributes, which are presented in Table 7.4. The mean for each attribute is higher for non-visitors. Table 7.5 shows previous visitors rate Taupo's performance for four cognitive attributes more favourably. Also, visitors perceive Taupo more 'pleasant'. Intent to visit is higher for visitors.

**Table 7.3 Perceived Differences in Coromandel's Performance**

	Visitors	Mean	Std.	Non visitors	Mean	Std.	t	Sig
Not too touristy	712	5.1	1.4	39	4.6	1.8	2.131	.033
Scenic Beauty	716	6.3	0.9	40	5.8	1.4	3.303	.001
Swimming/boating	704	6.2	1.1	38	5.6	1.5	3.222	.001
Fishing	640	5.9	1.4	31	5.2	1.7	2.838	.005
Walking/tramping	692	6.0	1.1	35	5.4	1.6	3.114	.002
Maori culture	499	2.6	1.5	26	3.6	2.0	-3.308	.001
Unpleasant/Pleasant	716	5.7	1.2	41	4.9	1.2	4.375	.000
Intent to visit	716	4.9	1.4	41	4.2	1.6	3.031	.003

**Table 7.4 Perceived Differences in Bay of Islands' Performance**

	Visitors	Mean	Std.	Non visitors	Mean	Std.	t	Sig
Not too touristy	703	3.8	1.6	38	4.7	1.6	-3.275	.001
Beaches	699	5.0	1.6	37	6.1	1.2	-4.137	.000
Shopping	674	3.7	1.6	30	4.6	1.6	-3.365	.001
Adventure activities	666	4.8	1.5	28	5.5	1.3	-2.560	.011
Hot pool bathing	495	2.8	1.8	23	4.6	1.8	-4.550	.000
Value for money	676	4.6	1.4	29	5.2	1.6	-2.131	.033
Wineries	483	3.0	1.7	24	3.8	2.1	-2.259	.024

**Table 7.5 Perceived Differences in Taupo's Performance**

	Visitors	Mean	Std.	Non visitors	Mean	Std.	t	Sig
Fishing	669	5.8	1.4	23	5.0	1.7	2.404	.017
Close to other dest's	717	5.4	1.4	22	4.8	1.7	1.981	.048
Hot pool bathing	643	5.5	1.6	18	4.7	1.8	2.061	.040
Accommodation	706	5.7	1.1	19	5.1	1.1	2.541	.011
Unpleasant/Pleasant	721	5.4	1.2	24	4.8	1.4	2.482	.013
Intent to visit	722	4.5	1.4	26	3.5	1.5	3.608	.000

# Cluster Analysis

Cluster analysis refers to a class of techniques designed for classifying patterns within data, and is particularly useful for grouping respondents into relatively homogeneous clusters. Cluster members tend to be more similar to each other and dissimilar to those in other clusters. While comparable to factor analysis as a data reduction technique, cluster analysis is however more ad hoc, without an underlying theoretical model (Malhotra et al, 1996). Cluster analysis begins with no prior knowledge of the appropriate number of clusters, or the membership of the clusters.

The two main methods of assigning cases to clusters are the hierarchical and K-means procedures. In hierarchical analysis the process begins by finding the closest pair of cases and forming them into a cluster. SPSS 10.0 provides 37 distance measures for different types of data. For interval scales the most common measure is Euclidean distance. Pairs of cases are continually joined until all data is in one cluster. The technique is termed hierarchical since every cluster formation remains together, in a tree like formation, until the final step. A benefit of the hierarchical technique is that it produces a number of outputs that can be used to judge the appropriate number of clusters. These include an agglomeration schedule, dendrogram and vertical icicle plot. Hierarchical cluster analysis is most suitable for small samples.

K-means cluster analysis begins by using the data from the first  $k$  cases to estimate the means of  $k$  clusters (SPSS, 1999). Initial cluster centres are formed and each case is assigned to the closest centre. An iterative process continually recalculates the cluster centres until changes cease. A disadvantage of the technique is that the specification of the desired number of clusters and the selection of the initial centres are arbitrary (Malhotra et al., 1996). However, K-means cluster analysis is quicker and more effective for samples containing more than 200 cases (SPSS, 1999).

The number of clusters was determined by tests of the hierarchical procedure, using different subsets of the sample. The data used is the four factors of attribute importance. Three trials were undertaken, with the SPSS 'select cases' function used to randomly select approximately 25 per cent of the sample for each. The three subsets contain 186, 204 and 169 cases. For each of these tests the dendrogram and agglomeration schedule were analysed to determine the appropriate number of clusters. The agglomeration schedule ceases when the increase between stages becomes large. The dendrogram enables a visual interpretation of the agglomeration schedule and cluster formations. The technique proved internally consistent with the emergence of a similar four-cluster solution in each test. A K-means procedure was then used for the entire sample, with instructions for a four-cluster solution. The final cluster centres are shown in Table 7.6. The largest differences are between clusters 2 and 3, as presented in Table 7.7.

**Table 7.6 Final Cluster Centres**

	<b>Cluster 1 n=186</b>	<b>Cluster 2 n=152</b>	<b>Cluster 3 n=190</b>	<b>Cluster 4 n=235</b>
<b>Factor 1</b> The good life/ infrastructure	5.58	4.25	5.78	4.56
<b>Factor 2</b> Getting away from it all	4.56	3.20	5.62	4.61
<b>Factor 3</b> Outdoor play	2.71	2.06	5.47	4.23
<b>Factor 4</b> The weather	4.85	3.21	5.57	3.72

**Table 7.7 Distances between Final Cluster Centres**

	<b>Cluster 1 n=186</b>	<b>Cluster 2 n=152</b>	<b>Cluster 3 n=190</b>	<b>Cluster 4 n=235</b>
Cluster 1		2.593	3.056	2.154
Cluster 2	2.593		5.041	2.659
Cluster 3	3.056	5.041		2.729
Cluster 4	2.154	2.659	2.729	

A one-way ANOVA reveals significant differences between the means of motivation factors shown in Table 7.8. Scheffe's post-hoc tests reveal significant differences ( $p < .001$ ), between most clusters for each factor. However, for factors

1, 2 and 4, there is no significant difference between clusters 1 and 3, and for factor 3 there is no significant difference between clusters 1 and 4.

**Table 7.8 Motivation Factor Means by Cluster**

Motivation Importance	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 n=190	Cluster 4 n=235
Factor 1 – Stimulation	5.1	4.4	5.2	4.5
Factor 2 – Family time	5.0	4.3	5.3	4.6
Factor 3 – Unwinding	5.2	4.7	5.7	5.1
Factor 4 – VFR/Events	5.5	4.7	5.6	5.0

The means for the individual motivation items are shown in Table 7.9. A one-way ANOVA reveals significant differences ( $p < .001$ ) for nine items. Scheffe's post-hoc tests reveal the largest differences are between clusters 2 and 3.

**Table 7.9 Motivation Means by Cluster**

Motivation Importance	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 n=190	Cluster 4 N=235
Visit friends or relatives	2.9	2.7	3.1	2.9
Break from routine	3.4	3.0	3.4	3.3
Relaxation	3.5	3.2	3.6	3.4
Attend an event	2.5	2.4	2.6	2.3
Time with my children	3.2	3.0	3.5	3.3
Excitement/action	2.1	1.7	2.7	2.2
Meet new people	1.8	1.4	1.9	1.5
Romance	2.4	2.1	2.8	2.5
Explore/learn new things	2.6	2.2	2.9	2.6
Where friends haven't been	1.7	1.3	2.1	1.4
Educate my children	2.7	2.3	3.1	2.8

Table 7.10 shows the mean attribute importance for each cluster. Cross-tabulation identifies the characteristics of each cluster. Chi-square analysis identifies significant differences ( $p < .01$ ) for age, number of dependent children and education levels. Cluster membership by age is presented in Table 7.11, where clusters 3 and 4 contain higher levels of younger respondents, while cluster 1 contains more aged over 50 years. Cluster membership by number of dependent children is shown in Table 7.12, where higher levels of those without children are in clusters 1 and 2. Cluster membership by education levels is presented in Table 7.13, where there is a higher level of those with a high school education in clusters 1 and 3, and a higher level of graduates and professionals in cluster 4.

**Table 7.10 Attribute Importance by Cluster**

Attribute Importance	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 n=190	Cluster 4 N=235
Comfortable drive	5.6	5.0	5.9	5.4
Good weather	5.6	4.1	6.1	4.5
Lots to see/do	5.3	3.8	5.9	4.4
Not too touristy	4.3	3.1	5.3	4.4
Ocean beaches	4.3	2.9	5.9	4.7
Scenic beauty	5.5	4.1	6.2	5.4
Swimming/boating	3.1	2.6	6.0	5.1
Fishing	2.0	1.5	5.2	3.8
Close to other destinations	3.5	1.7	4.6	2.3
Walking/tramping	4.0	2.9	5.3	4.1
Snow sports	2.1	2.0	3.8	2.9
Friendly locals	4.6	2.9	5.6	4.4
Shopping	4.6	2.8	4.9	3.0
Adventure activities	3.0	2.1	5.1	3.8
Hot pool bathing	4.4	3.1	5.1	3.9
Cafes/restaurants	5.9	4.4	5.9	4.6
Accommodation	6.5	5.5	6.4	5.6
Maori culture	2.4	1.7	3.4	2.2
Value for money	6.4	5.4	6.5	5.7
Wineries	4.0	3.1	4.3	3.4

**Table 7.11 Cluster Membership by Age**

Age	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 n=190	Cluster 4 n=235	Total
18-25	4	2	9	10	25
26-34	16	27	21	54	118
35-49	59	56	85	97	297
50-64	72	44	54	63	233
65+	35	23	21	11	90
<b>Total</b>	186	152	190	235	763

**Table 7.12 Cluster Membership by Number of Dependent Children**

	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 n=190	Cluster 4 N=235	Total
0	127	98	97	103	425
1-2	48	38	72	102	260
3+	10	16	21	29	76
<b>Total</b>	185	152	190	234	761

**Table 7.13 Cluster Membership by Education**

	Cluster 1 n=186	Cluster 2 n=152	Cluster 3 N=190	Cluster 4 n=235	Total
High School	83	46	81	69	279
Polytechnic	38	23	42	53	156
Graduate	20	27	20	38	105
Professional	27	33	41	51	152
Post-graduate	17	23	5	22	67
<b>Total</b>	185	152	189	233	759

The four clusters are described as follows:

**Cluster 1 – Indulgers**

Most with no dependents, and tending to be either under 35 years or over 50 years, members of this group seek a scenic destination offering good value for money accommodation, eateries and lots to see/do. Unappealing attributes included fishing, swimming/boating and adventure activities. This group gives the second highest ratings of Rotorua's performance.

**Cluster 2 – Passives**

This is the smallest group, and members are generally older, most with no dependents, seeking a destination with suitable accommodation and representing good value for money. Most other attributes hold little appeal.

**Cluster 3 – Energetics**

This group are young at heart, with lower education levels, seeking a destination that has it all, including infrastructure and outdoor activities. Respondents are enthusiastic about all four factors, and all attributes except Maori culture. They are also the highest raters of Rotorua's performance.

**Cluster 4 – Escapists**

Members of this group are not overly enthusiastic about any one factor, but seek a scenic destination with some outdoor attractions, water sports and activities, with a level of amenities. This is the largest cluster, and contains a higher level of younger respondents with families.

As shown in Table 7.14 each cluster indicates a strong intent to take a short break. An ANOVA reveals no significant differences between clusters. The highest intent to visit any destination is for Coromandel. Cluster 4's 'Escapists' indicated the strongest intent to visit Coromandel. Although Coromandel has the highest level of intent to visit, Rotorua consistently has the largest number of ToMA respondents. As shown in Table 7.15, for each cluster, almost one-quarter of members selected Rotorua as ToMA choice. These results are consistent with the ToMA results for the entire sample, which are presented in Chapter 5.

**Table 7.14 Cluster Intent**

Intent	Cluster 1 Indulgiers n=186	Cluster 2 Passives n=152	Cluster 3 Energetics n=190	Cluster 4 Escapists n=235
For a short break	5.8	5.6	5.7	6.0
To visit Coromandel	4.6	4.7	4.9	5.0
To visit Rotorua	4.7	4.4	4.7	4.7
To visit Bay of Islands	4.5	4.2	4.7	4.5
To visit Taupo	4.4	4.3	4.5	4.4
To visit Mt Maunganui	4.2	3.9	4.3	3.8

**Table 7.15 Cluster ToMA**

ToMA Destination Selection	Cluster 1 Indulgiers n=186	Cluster 2 Passives n=152	Cluster 3 Energetics n=190	Cluster 4 Escapists n=235
Rotorua	49 (26%)	39 (26%)	42 (22%)	50 (21%)
Coromandel	23 (12%)	19 (13%)	29 (15%)	37 (16%)
Bay of Islands	20 (11%)	19 (13%)	25 (13%)	33 (14%)
Taupo	26 (14%)	16 (11%)	24 (13%)	32 (14%)
Mt Maunganui	13 ( 7%)	19 (13%)	16 ( 8%)	14 ( 6%)

To examine the differences between the four clusters' perceived performance of Rotorua on the four factors, a one-way ANOVA was used. This reveals significant differences between clusters ( $p < .001$ ) for each factor. Scheffe's post-hoc tests reveals clusters 3 and 1 consistently rate Rotorua's performance higher than clusters 2 and 4. Table 7.16 shows a comparison of the performances of Rotorua and Coromandel, by cluster, which are consistent with the findings presented in Chapter 6. Each cluster consistently rates Rotorua's performance higher on factors 1 and 4, while Coromandel performs higher on factors 2 and 3.

**Table 7.16 Comparison of Rotorua/Coromandel Factor Performances**

Factor	Cluster 1 Indulgiers n=186		Cluster 2 Passives n=152		Cluster 3 Energetics n=190		Cluster 4 Escapists n=235	
	Rot	Cor	Rot	Cor	Rot	Cor	Rot	Cor
<b>Factor 1</b> Stimulation	5.7	4.5	5.2	3.9	5.8	4.8	5.4	4.2
<b>Factor 2</b> Family time	4.3	5.7	3.8	5.3	4.7	5.9	4.0	5.6
<b>Factor 3</b> Unwinding	4.9	5.4	4.6	5.2	5.4	5.9	4.9	5.6
<b>Factor 4</b> VFR/Events	5.6	5.1	4.9	4.5	5.6	5.5	5.1	4.9

Table 7.17 shows the comparison of affect between Rotorua and Coromandel. Rotorua is perceived the most 'arousing', while Coromandel is rated the most 'pleasant' by three of the four clusters.

**Table 7.17 Comparisons of Rotorua and Coromandel Affect**

	Cluster 1 Indulgers n=186		Cluster 2 Passives n=152		Cluster 3 Energetics N=190		Cluster 4 Escapists n=235	
	Rot	Cor	Rot	Cor	Rot	Cor	Rot	Cor
Arousing	5.3	4.5	5.2	4.2	5.5	4.9	5.3	4.5
Pleasant	5.6	5.6	5.3	5.6	5.7	5.8	5.4	5.8

This cluster analysis confirms Rotorua's broad appeal to each of the clusters. While this is an advantage, the challenge however may be in designing focused positioning communications that would suit each cluster. The key implication for Rotorua is the strong performances on factors 1 and 4, which are based on tourist infrastructure and lots to see and do. This is also supported by the 'arousing' affect results. Another important consideration is intent to visit Rotorua and Coromandel. Coromandel's stronger rating may be an indicator of future competitive problems for Rotorua. On the other hand, since respondents indicate multiple short breaks per year, perhaps more than one destination will be visited.

## Rotorua ToMA Group

Almost one quarter of respondents (24.1 per cent) selected Rotorua as ToMA choice, which is significantly higher than any other destination. These respondents are hereafter referred to as the Rotorua ToMA group. Table 7.18 shows the Rotorua ToMA group's mean scores for attribute importance and Rotorua performance. These results are listed in order of attribute importance for the Rotorua ToMA group. For example, the highest rating attribute importance mean is 'suitable accommodation' (6.11), which is Rotorua's fourth highest performing attribute (6.24). The grand mean for attribute importance is 4.34, similar to the grand mean for the entire sample (4.38).

**Table 7.18 Attribute Importance/Rotorua Performance by ToMA**

Attribute importance	Sample Rank N=763	Rank By Rot ToMA	Mean Importance	Std	n	Rot Perf Rank	Mean	Std	N
Suitable accommodation	1	1	6.11	1.06	179	4	6.24	0.99	176
Good value for money	2	2	5.99	1.31	180	12	5.37	1.13	176
Within a comfortable drive	3	3	5.69	1.22	180	6	5.95	1.21	179
Hot pool bathing	12	4	4.54	1.76	179	1	6.68	0.65	179
Good cafes/restaurants	5	5	5.33	1.58	178	8	5.72	1.06	177
Natural scenic beauty	4	6	5.25	1.31	178	5	5.98	1.01	175
Lots to see/do	7	7	5.08	1.52	179	3	6.36	0.90	179
Good weather	6	8	5.03	1.38	180	15	4.59	1.31	179
Friendly locals	9	9	4.32	1.81	172	16	4.48	1.47	168
Places for swimming/boating	10	10	4.28	1.81	174	10	4.59	1.71	155
Good ocean beaches	8	11	4.18	1.69	174	20	1.63	1.40	129
Places for walking/tramping	13	12	3.93	1.75	172	9	5.65	1.23	176
Shopping	14	13	3.86	1.70	167	14	4.68	1.33	176
Not too touristy	11	14	3.82	1.72	176	17	3.34	1.68	176
Adventure	16	15	3.63	1.72	171	7	5.90	1.14	178
Wineries	15	16	3.56	1.81	164	18	2.40	1.46	113
Close to other destinations	18	17	3.13	1.76	166	11	5.54	1.23	177
Fishing	17	18	2.85	1.84	152	13	4.88	1.70	155
Maori culture experiences	20	19	2.39	1.65	160	2	6.37	1.13	175
Snow sports	19	20	2.72	1.86	156	19	1.89	1.52	124
<b>GRAND MEAN</b>			<b>4.34</b>	<b>0.80</b>	<b>180</b>		<b>5.07</b>	<b>0.64</b>	<b>179</b>

A comparison of attribute importance rankings between the Rotorua ToMA group and the entire sample shows a general consistency across all but three attributes. 'Hot pool bathing' ranks higher in importance for the Rotorua ToMA group (4<sup>th</sup>) in comparison to the entire sample (12<sup>th</sup>). 'Good ocean beaches' ranks lower at 11<sup>th</sup> instead of 8<sup>th</sup>, while 'not too touristy' ranks lower at 14<sup>th</sup> instead of 11<sup>th</sup>. Independent-samples t-tests indicate significant differences between the Rotorua ToMA group and other respondents in the importance ratings of four attributes, shown in Table 7.19.

**Table 7.19 Differences in Attribute Importance**

	Rotorua ToMA N	Rotorua ToMA Mean	Other respondents N	Other Mean	T	Sig.
Not too touristy	175	3.8	568	4.5	-4.489	.000
Good ocean beaches	173	4.2	571	4.6	-2.694	.007
Fishing	151	2.8	508	3.4	-2.610	.009
Hot pool bathing	178	4.6	540	4.0	3.493	.001

Independent-samples t-tests between the Rotorua ToMA group and other respondents indicate significant differences in Rotorua's performance for seven attributes, attribute sum and attribute grand mean. These differences are highlighted in Table 7.20. In each case the mean for the Rotorua ToMA group is higher than that for other respondents.

**Table 7.20 Differences in Rotorua Performance**

	<b>Rotorua ToMA n</b>	<b>Rotorua ToMA Mean</b>	<b>Other respondents n</b>	<b>Other Mean</b>	<b>t</b>	<b>Sig.</b>
Within a comfortable drive	178	6.0	578	5.4	4.178	.000
Lots to see/do	178	6.4	577	6.0	3.784	.000
Not too touristy	175	3.3	561	2.8	3.258	.001
Scenic beauty	174	6.0	576	5.7	2.887	.004
Good cafes/restaurants	176	5.7	565	5.4	3.135	.002
Suitable accommodation	175	6.2	565	5.4	3.493	.001
Good value for money	175	5.4	559	4.9	3.944	.000
Attribute sum	178	94.3	581	88.6	3.998	.000
Grand mean	178	5.1	581	4.9	3.210	.001

Rotorua's IPA matrix for the Rotorua ToMA is presented in Figure 1. The y-axis is placed at the grand mean for Rotorua performance (5.1), and the x-axis is placed at the grand mean for attribute importance (4.3). There are differences between the Rotorua ToMA group and the entire sample, in the range of determinant attributes presented in Chapter 6. Firstly, four attributes deemed determinant for the sample in general are below the grand mean for the Rotorua ToMA group's attribute importance: 'not too touristy', 'good ocean beaches', 'friendly locals', and 'places for swimming/boating'. Secondly, one additional attribute, 'hot pool bathing' is promoted to Quadrant 2 and therefore considered determinant. This suggests the Rotorua ToMA group still appreciates the trappings of Factor 1 – 'The Good Life/Infrastructure', but are less concerned with commercialism and friendliness of locals. The low importance of 'Maori culture experiences' for the Rotorua ToMA group is also noticeable.

Independent-samples t-tests between the Rotorua ToMA group and others indicate a significant difference for one motivation item ( $t = 3.525$ ,  $p < .001$ ). On this four point scale, the Rotorua ToMA group's mean for 'visit friends and relatives' is 2.6, while the mean for other respondents is 3.0.

**Figure 7.1 Rotorua ToMA IPA**

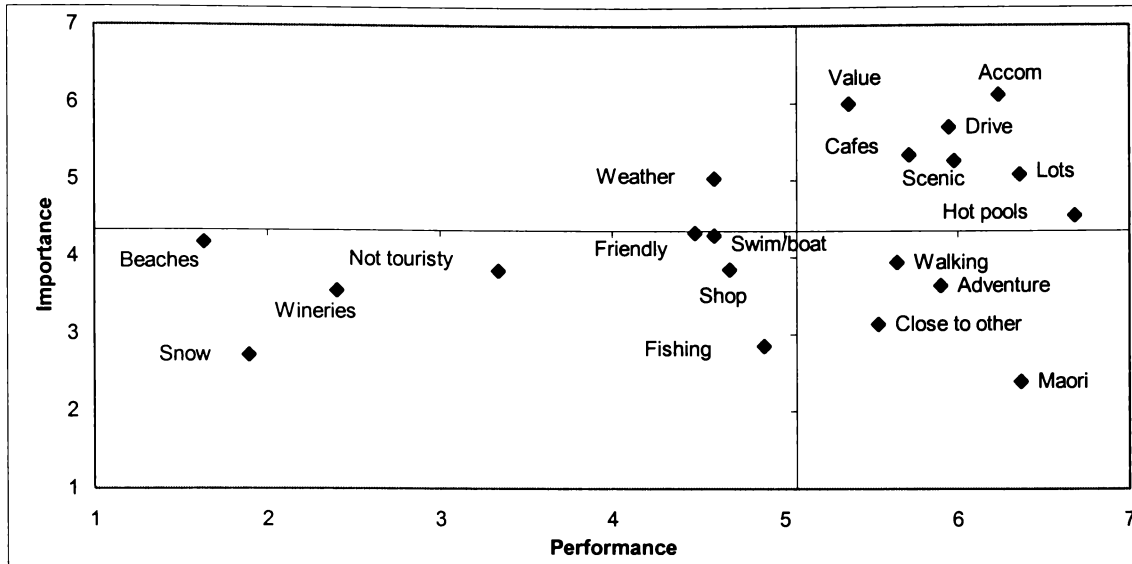


Table 7.21 shows the Rotorua ToMA group’s mean scores for affect towards Rotorua, in comparison to the other respondents. The means for the Rotorua ToMA group are significantly higher than those for other respondents.

**Table 7.21 Rotorua Affect by ToMA Respondents**

	Rotorua ToMA n	Rotorua ToMA Mean	Other respondents n	Other Mean	t	Sig.
Sleepy-arousing	177	5.7	576	5.2	5.705	.000
Unpleasant-pleasant	177	6.0	576	5.4	6.546	.000

Table 7.22 highlights how, for the entire sample, little separates each destination in terms of respondents’ likelihood of visiting within the following twelve months. All destination means are above the scale mid-point, with Rotorua and Coromandel again occupying the top two positions. The highest intent is for Coromandel. A total of 61.8 percent of respondents indicate a likelihood of 5,6 or 7, which further highlights the emerging competition Rotorua faces from Coromandel.

**Table 7.22 Likelihood of Visiting each Destination**

	N	Mean	Std.	n = 5, 6 or 7	%
Coromandel	759	4.8	1.4	471	61.8%
Rotorua	759	4.7	1.4	446	58.5%
Bay of Islands	760	4.5	1.4	397	52.1%
Taupo	755	4.4	1.4	383	50.1%
Mt Maunganui	751	4.1	1.4	292	38.2%

Table 7.23 presents the mean likelihood of visiting each destination by the ToMA group, in comparison to the other respondents. The largest difference is between the Rotorua ToMA group and other respondents. Likelihood of visiting is also significantly higher for each other destination's ToMA group.

**Table 7.23 Likelihood of Visiting by the Destination's ToMA Group**

	ToMA n	ToMA mean intent to visit	Other respondents n	Others mean intent to visit	T	Sig.
Rotorua	177	5.6	580	4.4	10.024	.000
Coromandel	107	5.7	652	4.7	7.353	.000
Taupo	98	5.5	657	4.3	8.718	.000
Bay of Islands	97	5.5	663	4.4	7.546	.000
Mt Maunganui	62	5.2	689	4.0	6.891	.000

Table 7.24 shows the differences for intent to visit Rotorua by ToMA choice. The mean likelihood of visiting Rotorua for the Rotorua ToMA group is 5.6, while the mean likelihood of visiting Rotorua for all respondents is 4.7. In comparison, of those respondents selecting Coromandel as ToMA destination, the mean intent to visit Rotorua is only 4.1. It was felt these differences support the factor-analytic IPA solution, MDS map and affective response matrix presented in Chapter 6, where Rotorua and Coromandel are positioned strongly on two quite distinct dimensions.

The geo-demographic characteristics of the Rotorua ToMA group are presented in Appendix E. As with the cluster analysis, the Rotorua ToMA group are generally evenly spread across the geo-demographic groups. Chi-Square tests indicate significant differences in only two categories. Firstly, for the age of respondents, the Pearson Chi-Square value is 14.082 ( $p < .01$ ). There is a higher representation from those in the 35-49 year age bracket (30.2 per cent), and a lower representation from those aged 26-34 (19 per cent), 50-64 (18.9 per cent) and 65+ (20.5 per cent).

Of concern is the high intent to take a short break by the 26-34 year group. As indicated in Chapter 5, on this 7-point scale, 51 per cent of this group indicate an intent of '7'. Secondly, and perhaps consistent with the previous category, for the number of dependent children the Pearson Chi-Square value is 8.132 ( $p < .05$ ).

There is a higher representation of those with two dependent children (26.5 per cent) and those with three or more children (34.2 per cent), and lower levels of those with no children (21 per cent).

There are some pointers that may assist marketers to keep in touch with the potential Rotorua ToMA group in the general Auckland population. For example, half of the group (51 per cent) reside in four inner city communities: New Lynn/Avondale, Hobson/Eastern Bays, Mt Roskill/Mt Eden, and Pakuranga/Howick. Also, approximately three quarters of the group are aged between 35-64 and in a permanent relationship.

**Table 7.24 Likelihood of Visiting Rotorua by ToMA Choice**

ToMA destination	Rot ToMA N	Mean likelihood of visiting Rotorua	Std	N	Mean likelihood of visiting Rotorua	Std
Rotorua	177	5.6	1.2	759	4.7	1.4
Coromandel	107	4.1	1.3	759	4.8	1.4
Taupo	98	4.6	1.4	755	4.4	1.4
Bay of Islands	97	4.6	1.4	760	4.5	1.4
Other Northland	73	4.3	1.6			
Mount Maunganui	62	4.4	1.3	751	4.1	1.4
Ruapehu	25	5.0	1.5			
Waikato	22	4.2	1.6			
Hawkes Bay	17	4.6	0.9			
Auckland	16	3.8	1.2			
Bay of Plenty	12	4.8	1.0			
Wellington	11	4.4	1.4			
Other – not within drive	8	5.3	1.8			
Taranaki	7	3.1	1.1			
Eastland	5	4.4	1.5			
Wanganui	1	5.0				
King Country	1	5.0				
Waiouru	1	5.0				
Total	742	4.7	1.43			
Missing	21					

## Chapter Summary

The chapter examines perceptual differences between respondents through previous visitation, cluster analysis and ToMA destination choice. Results confirm differences between previous visitors and non-visitors in perceptions for four of the destinations. For Rotorua there are no differences due the high ratio of visitors. Of the remaining destinations, three are perceived more positively by previous visitors. For Bay of Islands, however, there are a number of aspects where previous visitors rated aspects of the destination significantly lower than non-visitors.

Cluster analyses identify the characteristics and attitudes of four segments. While Rotorua's broad appeal is reinforced, preferences for clusters are consistent with the two dimensions of short break destination preferences previously indicated by the factor-analytic IPA, MDS and affective response matrix. Rotorua and Coromandel hold most appeal to different segments on different dimensions.

Few differences between the Rotorua ToMA group and the entire sample are noticeable in terms of motivation and attribute importance. However, significant differences exist for Rotorua's performance, affect and conation. Indeed the likelihood of visiting each destination is higher for those who selected that destination as ToMA choice. It is thought that Rotorua may have held a competitive advantage by virtue of the size of its ToMA group in comparison to the other destinations. However, the level of intent to visit Coromandel is higher than Rotorua for a larger number of respondents. An examination of the geo-demographic characteristics of the Rotorua ToMA group finds age and number of children to be significant. The characteristics of the Rotorua ToMA group point to south-side middle aged couples with children.

# Chapter 8 - Conclusions

The findings demonstrate the importance of analysing a destination's competitive position, from the demand perspective, in a travel context; and then the value of comparing this 'ideal' position with that projected by the RTO. The thesis concludes that while Rotorua's market position in the Auckland short break segment does represent a source of comparative advantage, it is not congruent with the current promotional theme, which is being used in all markets.

The chapter begins with a summary of key findings, concluding with a succinct description of Rotorua's position as a domestic short break destination. This is followed by a discussion on methodological issues, including a new definition for destination attractiveness. The thesis' limitations are then addressed. A programme of further research is outlined, along with a discussion on the managerial issues for RTOs, which include critical success factors for Tourism Rotorua.

## Rotorua's Position

An improved understanding of Rotorua's competitive position is considered important given the destination's status within the New Zealand tourism industry and the economic importance of tourism to the local economy. Tourism was Rotorua's first form of commerce, and remains the district's largest employer. The Rotorua tourism industry has vested interests in a diverse range of segments covering a broad spectrum of traditional, growth and emerging markets. It is speculated the position occupied by Rotorua might differ between some of these, although a lack of information exists to enable such an analysis. The thesis focus is narrowed to an exploration of one market, Auckland, which has been selected for two reasons. This market is Rotorua's largest source of visitor arrivals and may therefore be considered by many to be the most important. Also, there has been a lack of research into New Zealand's domestic travel market.

The investigation of aspects of Rotorua's tourism history, outlined in Chapter 3, provides an enhanced understanding of the evolution of New Zealand's first

holiday destination, adding to the recent efforts of Ateljevic (1998) and Horn, Fairweather and Simmons (2000). Conceptually the chapter analyses how historical issues might contribute to the development of a destination's image. In Rotorua's case, these are fourfold. First, the benefits of government resources in developing tourism infrastructure and promotion over 90 years, which while enhancing the profile the destination, may also have contributed to a culture of 'marketing dependence' within the local tourism industry. Rotorua did not seriously engage in destination marketing, at a level commensurate with economic value of tourism to the district, until the 1990s. Second, aspects of commercialism, unemployment levels, lake pollution, crime and accidents, which have been the subject of national media attention, led to the development of negative images in the domestic market. The combined effects of the 'marketing dependence' and negative images may be strongly associated with the 1980s decline in domestic holiday visitors to Rotorua. Third, given the consistency of destination promotion themes focusing on 'geothermal features', 'Maori culture experiences' and 'lots to see and do', it is expected these would feature strongly in any domestic market perceptions research. The fourth issue is the local government-led rejuvenation efforts in the 1990s, which featured a significant beautification of the central shopping district as well as a renewed and enhanced commitment towards destination promotion. The thesis represents an opportunity to examine the extent to which these have been successful in repositioning Rotorua's former dowdy image.

In attempting to identify Rotorua's current market position, it was found there was no accepted valid set of destination attractiveness variables, certainly not in the context of New Zealand short break holidays. Therefore, in Chapter 4, three techniques are used in the attempt to identify the range of attributes deemed salient to Aucklanders when considering a domestic short break by car. First, Kelly's (1955) Repertory Grid was used in interviews with Auckland residents. Repertory Grid is a valid qualitative technique that has been under-utilised by tourism researchers, and not previously applied in a New Zealand destination image study. Of particular appeal to the thesis is the manner in which the triad technique examines how travellers categorise and differentiate destinations.

Second, since the thesis is founded on an applied research problem, the perspective of the practitioner is an important consideration. Therefore personal interviews with tourism decision makers in five regions were held to obtain the supply-side perspective of attribute importance. One of the observations from the interviews was a tendency for the practitioners to focus on attributes specific to their destination rather than an overview of attributes from the traveller's perspective. Indeed, participants generally acknowledged a lack of research into the demand-side perspective for the travel context. Third, a review of 84 destination image papers published in the literature between 1973 and 2000 identified over 100 attribute themes. From these three methods, a set of 19 cognitive attributes was developed for use in a structured survey. Additionally one further attribute, which has featured prominently in Rotorua's history of promotions, was also included.

Three methods were then selected to operationalise destination attractiveness, as conceptualised. To measure cognitive images, IPA was selected as a valid technique that has not been extensively tested as a tool for destination position analysis. Also, IPA is easily communicable to practitioners. The questionnaire, which also enabled the more traditional MDS procedure, required respondents to firstly rate the importance of the 20 attributes and then rate the performance of Rotorua across the same items. Since positioning requires a frame of reference with the competition, the questionnaire also asked respondents to rate the performance of four rival destinations. Affective images were measured by an affective response matrix, which was based on two further scale items. To measure the conative image, respondents were asked to indicate their intent to visit each destination for a short break during the following 12 months.

Since the thesis is the first investigation of domestic short breaks in New Zealand, the characteristics of Aucklanders with a propensity for this type of holiday had not previously been profiled. Therefore the questionnaire was mailed to a systematic random sample of 3000 Auckland households. Both the number and level of usable responses are consistent with those achieved in previous multi-destination image studies, and are considered satisfactory for the requirements of the thesis.

Also, while there are some differences between the characteristics of respondents and those of the wider Auckland population, it is felt the sample profile is likely to be representative of those with the tendency to take short breaks. With regard to the results of questions relating to short break characteristics, which are presented in Chapter 5, the major implication for marketers is the wide-ranging appeal of short breaks from almost all sectors of the Auckland community. On the basis of the results, short breaks do not appear to be the exclusive domain of any geodemographic group. Respondents indicate a strong likelihood of taking a short break by car during the following twelve months. This supports overseas reports suggesting short breaks are a major holiday trend. The mean number of short breaks indicated per year is four. This single result proved a revelation to participants at each of the industry presentations, particularly since each of the five RTOs involved acknowledged they were yet to explicitly target this segment.

The mean maximum driving time of four hours to a short break destination is not surprising, given the relatively compact geography of New Zealand, the limited time involved in this type of holiday and general comments from the practitioner interviews and Repertory Grid participants. This result enables the development of a likely boundary of destinations within the mean driving time, ranging from the Bay of Islands in the north to Taupo in the south, and from the Waikato coast in the west to the Bay of Plenty coast in the east. This supports the selection of the destinations included in the second section of the questionnaire. Regions such as Gisborne/Eastland in the east, Tongariro in the south, and Taranaki in the west would be too far for the average short break. However, RTOs representing these destinations might be interested in the characteristics of the 19 per cent of respondents who indicated a maximum drive time of five to six hours or more.

In the unaided awareness questions, Rotorua, Coromandel and Bay of Islands were listed in the decision sets of over half of the sample, while the combined mentions of 'Other Northland' and Bay of Islands covered three-quarters of all respondents. The range of destinations elicited by this question further supports the inclusion of the five destinations used in the questionnaire, and the exclusion

of other destinations used in the Repertory Grid interviews: Waikato, Eastland/Gisborne, Napier, and Tongariro.

The highest rating short break motivation items were 'relaxation' and 'break from routine'. An exploratory factor analysis of the 11 motivation scales generated four dimensions, which were labelled: 'Stimulation', 'Family time', 'Unwinding' and 'VFR/events'. These are consistent with the physical, psychological and intellectual needs categories suggested by Mill and Morrison (1992). One of the implications of these results is travel context may not be a significant moderating variable for some motivation items, since the 'need for a break' and 'relaxation' are consistent with overseas studies. This was implicit in Plog's (2000) assertion that holiday travel is no longer a luxury but a psychological necessity.

In Chapter 6, individual IPA matrices were generated for each of the five destinations. These proved useful for the RTOs in identifying potential strengths and weaknesses of their area. However, given little separated some of the performances of the destinations across a number of attributes, the combined matrix plotting all destinations is cumbersome as a positioning analysis tool. It is suggested this may have been a function of the similarity of five near-home destinations in the travel context. These results demonstrate the importance of not analysing one destination in isolation, as the Rotorua IPA would be misleading without a comparison to competitors.

Since travellers simplify the images they hold of a destination, exploratory factor analyses were used in an attempt to reduce the number of attributes. Four distinct dimensions of short break destination attractiveness were identified, which pointed to potential opportunities for developing positioning themes. These factors, which are labelled: 'the good life/infrastructure', 'getting away from it all', 'outdoor play' and 'the weather', were then applied to the IPA. This factor analytic IPA approach is enlightening. The four-factor IPA matrix identifies distinctive leadership positions occupied by two destinations, Rotorua and Coromandel. Rotorua is positioned strongly on 'The good life/infrastructure' dimension, which features five attributes: 'Cafes/restaurants', 'Suitable accommodation', 'Shopping', 'Hot pool bathing' and

'Value for money'. For this dimension Coromandel ranks lowest of the five destinations. Conversely, Coromandel is positioned strongly as the leader for the 'Getting away from it all' dimension, which also features five attributes: 'Natural scenic beauty', 'Not too touristy', 'Ocean beaches', 'Places for walking/tramping' and 'Friendly locals'. Rotorua's performance on this factor is the lowest of the five destinations. It is suggested these two factors are the obverse of each other, and therefore valuable representations of potential differentiated positioning options. Intuitively these two positions appear realistic, given the contrasting characteristics of Rotorua and Coromandel, and supported the ToMA and decision set performances of the two destinations. To reiterate a positioning axiom, the easiest route to the mind is by reinforcing existing beliefs and feelings, rather than to attempt to change an individual's perceptions. With this in mind, these results provide guidelines for Rotorua and Coromandel marketers.

To verify the IPA output, two further procedures were utilised. MDS was used to generate a perceptual map of the five destinations. The MDS results are consistent with the IPA in that Rotorua and Coromandel are positioned furthest from each other in both the one and two-dimensional analyses. Also, the affective response matrix supports both the factor-analytic IPA and the MDS perceptual map dimensions, in that Rotorua is perceived the most 'exciting' while Coromandel is perceived most 'relaxing'. These two affective terms appear to be closely associated with the cognitive factor dimensions. Alternatively, the cognitive attributes help explain these affect positions. The high level of previous visitation is a relevant consideration at this point. An important implication is that affective messages may be used in promotional themes aimed at previous visitors, since for example, 'exciting' or 'arousing' might trigger memories of the underlying attributes in Factor 1. On the other hand, for an individual with no previous experience at the destination, a cognitive elaboration of such an affective message will be required.

It is proposed Rotorua's strong position as a short break destination is partly attributable to reaching the 'maturity/stagnation' stage of the life cycle (see Butler, 1980) in the last quarter of the 20<sup>th</sup> Century. Admittedly Rotorua's destination life

cycle has not been analysed in the thesis. However, it has been recommended the life cycle model be viewed from the perspective of different segments (Hayward, 1986). In this regard there have been significant challenges facing Rotorua in the domestic market. As discussed, domestic visitor arrivals declined during the 1980s and research indicated Rotorua was losing appeal as a summer holiday destination. As a destination reaches maturity it will attract less adventurous and more conservative visitors (see Butler 1980, Cohen 1972, Cooper 1994, Plog 1974). Of interest to the thesis is the assertion that declining numbers of holidaymakers will be replaced by weekend visits or day trips (Plog, 1974). This predicament does offer some benefits to a destination. For example, as a consequence one of the opportunities for growth is through increased repeat visitation, particularly for short breaks. Also, due to the brief time involved in short breaks they tend to be more exciting, in comparison to a longer holiday where the chances of boredom would be more likely (Gratton, 1990). In this regard, while other destinations were perceived to be more 'pleasant', the 'arousing' affective image maybe more important in the short break travel context.

With regard to the four proposed historical issues contributing to the current image of Rotorua, it is suggested Rotorua was New Zealand's first tourist destination, thanks to the efforts of central government. The results provide an example of the proposition that being the first to the market is associated with market leadership (see Ries and Trout, 1986). This was encapsulated in a comment from one of the respondents:

*We usually go to Rotorua as it is diversified, has something for everyone and friendly staff are happy to tell us about local activities – this needs to happen at other destinations – I think Rotorua has had more practise!! And we always enjoy our excursions there (Respondent 503).*

Interestingly, Rotorua did not perform strongly on the 'pleasant' dimension, relative to the other destinations. This may be a function of the historical negative image aspects summarised previously. This could mean the effects of recent CBD beautification are yet to bear positive perceptual fruition, or are outweighed by

other aspects such as commercialism and/or unfriendly locals. It may also be that travellers from Auckland will tolerate these issues to achieve the other benefits offered by Rotorua. Therefore Rotorua's position as an 'attractive' domestic short break destination is summarised as follows:

*Rotorua is the most exciting short break destination available within a comfortable drive of Auckland; with particular appeal for those seeking a comprehensive tourism infrastructure including accommodation, eateries and a range of outdoor and all weather attractions and activities representing good value.*

In the context of short break holidays by car, the thesis represents an investigation of the convergence of the perceptions held of Rotorua by Aucklanders, with Rotorua's past and current promotional themes. It is suggested the current theme, 'Feel the Spirit Manaakitanga', does not optimise Rotorua's distinctive position as domestic short break destination. However, the political reality of destination promotion cannot be ignored when considering this conceptually ideal position.

## Methodological Issues

If destination attractiveness is a function of the benefits sought by a traveller and the ability of a destination to provide them (Mayo and Jarvis, 1981), it might be reasonable to expect attractive destinations would hold a competitive advantage over less appealing places. However, possessing attractive attributes does not necessarily guarantee success. Travellers are spoilt by holiday destination choice, with thousands of DMOs competing for attention. Differentiation has become difficult to achieve since any number of destinations can now ably provide the benefits sought by a given group of travellers. Consequently, destinations may have become substitutable. From this perspective 'attractiveness' may only represent competitive parity status in the VRIO model of competitive advantage.

Overseas studies suggest individuals only actively consider a small sub-set of destinations in the decision process. Destinations not included in this decision set are thought to have a lower selection probability. Therefore, it is proposed a destination's inclusion in such a small decision set must represent an effective indicator of competitive advantage, and that effective positioning can be used to achieve this placement. Positioning offers the opportunity to develop a mutually beneficial relationship between the DMO and the traveller. On the supply side, effective positioning can be used to assist the marketer cut through the media clutter to achieve ToMA and stimulate intent. On the demand side a meaningful position, read attractive proposition, may help the busy traveller's decision-making. To gain cut through in the market, positioning messages should focus on only one or a few features of destination attractiveness that are determinant in the decision process. For multi-attributed destinations, positioning necessitates making trade-offs in terms of which features to highlight and which to omit in communicating the theme. Such decision-making has political implications, since most tourism businesses would expect any destination positioning theme to be relevant to their product or product class. Also, the heterogeneity of markets means one positioning theme may not be suitable for all travellers and all travel contexts.

Travellers may hold more than one destination decision set. For example, the composition of preferred destinations will likely vary between different travel contexts. Therefore the goal of DMOs is to somehow ensure their destination is top of mind for a particular holiday type at the time travel is contemplated by the target. Travel context is likely to be an important moderating variable in destination attractiveness measurement, and yet there has been relatively little attention in the destination literature. In particular, there has been no previous study published about destination attractiveness in the context of domestic short break holidays in New Zealand.

Decision set composition may be relatively stable over time, since it has been shown that destination image change occurs slowly. It is difficult to convince individuals to change their beliefs and feelings. Nevertheless destination image can and does change as travellers and destinations evolve through different life cycles. The ecological and built landscape alters, and the benefits sought by visitors may change. The addition of a new destination to the decision set results in the compensatory removal of another. Thus, while the composition of destinations in the decision set may change the number may not. With increasing competition between destinations, DMOs therefore face the twin challenges of not only strategically stimulating interest among non-visitors, but also keeping in touch with previous visitors. The goal is to increase demand by stimulating intent to visit. Therefore, in the thesis model it is implied destinations considered attractive be classified as those in a traveller's decision set, preferably as ToMA choice, and possessing a strong conative image. The intention of the thesis has been to explore this from the perspective of New Zealand RTOs. In particular, two issues, based on experience in the field, motivated the thesis. First, it is not currently feasible for an RTO to undertake the research required to identify the destination's competitive position in all major markets, and then subsequently track them over time. Second, one positioning theme may not be suitable for all markets and travel contexts.

One of the outputs of the literature review, which continued throughout the thesis, is a summary of 142 published destination image papers from the period 1973-

2000 (see also Pike, 2002a). This summary, tabled in Appendix A, provides destination image researchers with a useful reference guide to the context, method and focus of previous studies. Also, researchers could screen the attribute list through focus groups of potential travellers and local stakeholders, to identify those salient in a situation-specific context. In Chapter 4 it was suggested the attributes selected for the questionnaire might be regarded as super-ordinate constructs, which subsume sub-ordinate constructs. For an enhanced understanding of any attributes the Repertory Grid results could be mined.

The value of engaging in a qualitative investigation of attribute salience is demonstrated by the differences revealed between the supply and demand side perspectives, as well as by differences between the overseas literature and the New Zealand short break travel context (see also Pike, 2003). The thesis demonstrates the effectiveness of Repertory Grid, a technique that has been under-utilised by tourism researchers, for the investigation of how travellers differentiate destinations. Opportunities exist to further test the suitability of the technique for researching attribute salience. For example, standardised group applications could provide a useful means of achieving a substantially increased sample size. Participants could use a self-completing form, and results could be synthesised and then presented to the group for discussion, either after a break in proceedings, or at a future meeting. As suggested in Chapter 4 this would be a form of structured focus group.

Fortunately the importance ratings of almost all the cognitive attributes are positive, since by their inclusion all but one had been deemed salient. The results provided further evidence that some attributes will be generic while others will be specific to destinations and/or other travel contexts. Due to their convergence with the literature, the following seven represent generic attributes that warrant inclusion in future studies of holiday destination image:

- Suitable accommodation
- Good value for money
- Visually attractive environment
- Good eateries
- Pleasant climate
- Things to see and do
- Friendly locals

The remaining four determinant attributes are either destination or context specific: 'comfortable drive from home', 'good ocean beaches', 'places for swimming/boating' and 'not too touristy'. From the analysis of the respondents' unaided feedback at least six new attribute themes should be considered for future studies involving domestic travel in New Zealand:

- Attractions/activities for children
- Eating places catering for children
- Vegetarian eating places
- Offers opportunities for relaxation
- Availability of packages
- High levels of customer service standards

It has been argued the 'importance' component of attitude has been neglected in marketing research, and the results support the assertion that such a component warrants inclusion. This has methodological implications concerning the attribute ratings. For example, as discussed in Chapter 3, a number of researchers have used open-ended questions of respondents, both visitors and consumers, to identify perceptions of Rotorua. Usually 'Maori culture' and 'geothermal' are the most common features elicited, which is not surprising. These features therefore form a significant component of Rotorua's 'destination image'. However, when examining how participants differentiate short break destinations the Repertory Grid interviews did not elicit 'Maori culture experiences' as a salient attribute, and the survey respondents confirmed this as unimportant. However, respondents did

rate Rotorua's ability to provide this feature as the highest performer of any destination on any attribute. Clearly, without the evaluative component such a performance result would be misleading. IPA was employed for its evaluative capability, as well as to provide data that could be readily communicable to practitioners. It is felt the technique could be more widely used in destination positioning analysis (see also Pike, 2002b).

The extension of the IPA technique to incorporate dimensions derived from factor analysis has contributed to an enhanced understanding of the suitability of IPA for destination positioning analysis. The factor analytic IPA, MDS perceptual maps and affective response matrix proved effective in identifying the positions of the competitive set of five domestic destinations. In particular, the IPA and affective response matrix results aided the interpretation of the MDS maps. In this regard, the use of the three techniques could be of value in analysing perceptions of the positions of other competitive sets of 'similar' destinations. For example this could include small Pacific island destinations such as Samoa, American Samoa, Cook Islands, Vanuatu, Fiji and New Caledonia. These destinations offer similar 'winter sun' benefits and are difficult to differentiate in the New Zealand market (Oscar Netzler, Samoa Visitors Bureau marketing manager, Personal communication, June 2001). Arguably, interpretation in many other positioning studies has been facilitated by the inclusion of destinations that are more geographically dispersed and have featured more diverse characteristics, leading to more opportunities to differentiated promotion.

It has been suggested that perceptual positioning maps, which focus on multiple attributes, fail to consider the holistic rankings placed by travellers on competing destinations (Reich 1997, 2001). Reich proposed the development of a typology of linear market positions, which could be measured by either a single preference scale or a summated score from multi-attribute scales. The thesis results address this by providing destination rankings in terms of unaided ToMA and decision sets as well as intent to visit (see also Pike, 2002c). Collectively, the positioning maps and ToMA/Conation results provide a clearer positioning analysis as called for by Reich.

In general the proposed model of positioning as a source of competitive advantage developed in Chapter 2 has been upheld, since the two destinations with the strongest and most distinctive perceptual positions also ranked highest for ToMA, decision sets and conation. The results demonstrate Rotorua's leadership in terms of recent visitation currently represents a source of comparative advantage. As a result a new definition is offered to represent destination attractiveness in a way that generates competitive advantage:

*A distinctive ToMA position, which is based on leadership in determinant attributes, in the decision sets of those in a significant group of travellers who have an intent to visit within a given time period*

As a short break option for Aucklanders, Rotorua is an attractive destination, with the resources to satisfy the main benefits sought in such an experience. A short break is a regular experience that is not a luxury but a necessary part of life. Rotorua is attractive for short breaks despite having foibles that threaten its overall touristic image. From the demand perspective, there are few competitive alternatives for a short stay at a place with over 100 accommodation houses, over 100 eateries and lots of free and commercial attractions and activities of appeal year round in all weathers. For the stressed Aucklander seeking a brief respite from routine, the Rotorua option does not require a taxing information search. Such easy decisions are favoured by the mind, and a Rotorua short break is a low risk decision. This is important, since while short break holidays may not involve significant financial risk, they do require the use of limited leisure time, which will impact on expectations (Alford, 1998).

Conceptually the thesis is situated within the progress being made in the modelling of destination competitiveness. Specifically, as discussed in Chapter 1, Ritchie and Crouch (2000a) presented a conceptual model of destination success characteristics, which they had been developing since 1992 (see Ritchie and Crouch, 2000b). Their motivation was that while researching destination competitiveness was "tourism's holy grail" (p. 5), the topic lacked attention from

researchers. One of the key elements in the Ritchie and Crouch model was the proposed relationship between resources representing sources of comparative advantage and resource deployment to achieve competitive advantage. In this regard, the thesis has contributed to one aspect of the model. Firstly, in Ritchie and Crouch's model, positioning is but one of a large range of components. While their model addresses a comprehensive of key variables in the micro and macro environments, Ritchie, Crouch and Hudson (2000) recognised that the challenge ahead lay in developing operational measures of components, to perhaps progress towards the development of a destination competitiveness index. The thesis addresses the issue of competitiveness in relation to market position. First, the investigation of Rotorua's evolution demonstrates the importance of sustainable competitiveness. Ritchie and Crouch (2000b) introduced the term 'sustainability' to the concept of a competitive destination, reasoning that without it true success would only be illusory. One implication of the thesis findings is that without the remedial action that was taken during the 1990s, Rotorua's competitiveness as a holiday destination would have been seriously impaired. Second, the relationship between Rotorua's resources and market position in one specific travel context is demonstrated.

## **Limitations**

As with any research project there are a number of limitations to be considered in the interpretation of the thesis' findings. For example, the Rotorua history section relies predominantly on written accounts of historians as well as articles in the news media. Only limited discussions were held with any individuals involved in past events. However, an interpretive investigation of key actors' perspectives is beyond the scope of the thesis. In terms of identifying key factors contributing to Rotorua's current image, including destination promotion themes, the recorded history is considered sufficient, with the caveat there may be different interpretations of some the events discussed.

Increasingly, researchers have been calling for greater use of mixed methods in destination image analysis. While the thesis used a combination of qualitative and quantitative techniques to good effect, limitations are acknowledged. The

Repertory Grid sample was limited to two groups. While it has been argued that a large sample is not required for the technique, this was not tested. Although the data analysis indicated a redundancy of new information as the number of interviews increased, since this was the first examination of short break attribute salience in New Zealand, with greater resources, other participants could have included, for example, blue-collar workers, ethnic groups, sports and special interest groups and retirees. Also, while rigorous efforts were made to ensure the cognitive attributes were representative of the construct domain, with additional resources the thesis could have pilot tested a longer attribute list to an Auckland sample, prior to finalising the questionnaire, following Churchill (1979). Also, one item that featured strongly in the Repertory Grid data was omitted from the questionnaire. 'Relaxing' was considered an expression of affect, which would be implicit in the affective response matrix. This item could have been included either in the cognitive attribute list or explicitly in the affective items.

Intent to visit each destination was measured by stated likelihood, and may not ultimately reflect actual visitation. Fishbein (1967, p. 477) offered a caution in this regard:

*After more than seventy-five years of attitude research, there is still little, if any, consistent evidence supporting the hypothesis that knowledge of an individual's attitude toward some object will allow one to predict the way he will behave with respect to the object.*

As discussed in Chapter 4, Fishbein and Ajzen (1975) suggested it is important to make a hypothetical situation as close to a realistic scenario as possible. In this regard, the intent to visit question could be improved by reducing the time frame. Asking respondents to indicate destinations being considered in the next three months may have resulted in a closer approximation of the short break decision process. The use of a longitudinal design could then have tested the relationship between ToMA selection and actual visitation.

The motivation items were selected from the literature. Since there had been no previous investigation of short break motivation in New Zealand, a qualitative investigation may have generated different or additional items. These may or may

not have generated different correlations with the affect items, given the complexity of travel motivation measurement: "...identifying specific or dominant determinant factors may be a difficult, if not impossible task, particularly given the fact that tourists may be unwilling or unable to express their real travel motives" (Sharpley, 2002, p. 309).

It is not known whether the repetitive nature of the IPA questionnaire design resulted in any order effects. Also, even though the two sections of the questionnaire were clearly separated within the booklet, with appropriate instructions, there is no way of controlling whether respondents previewed section two prior to completing section one.

The results do not completely capture the 'image' of each of the destinations. Given any quantitative approach leaves open the issue of what respondents understand of the questionnaire items, it might be assumed that 'image' still retains an element of being 'fuzzy'. However, the intent is to determine how destinations are positioned in one market for a specific travel context. For a more comprehensive picture of each destination's image, another approach would be required. For example, the importance of destination-specific or unique attributes for each destination should be incorporated into the model (Echtner and Ritchie, 1991). A destination image study may be undertaken in isolation, while positioning analysis requires a frame of reference with competing destinations. The poor performance of 'Maori culture experiences' was a useful example of this issue. As discussed previously, this is a 'unique' attribute of Rotorua, featuring prominently in domestic consumers' images of the destination. However, this prominent feature appears not to be important when differentiating short break destinations. Therefore 'perceptions of place' or destination image should not be taken to represent a destination's market position.

Regarding the examination of perceptual differences between visitors and non-visitors, a limitation was not being able to determine when previous visitation had occurred. There was no way of determining whether a respondent who indicated visitation had done so only once as a child, perhaps decades ago, or whether they

had made more recent and regular visits. Therefore the inclusion of a filter question would have been of value.

The findings represent a snapshot at one point in time. Hamel and Prahalad (1989) criticised corporate strategists for being fixated on current competitive analysis, which ignored the future, and was therefore akin to a snapshot of a moving car. Therefore, while it has been argued that images of destinations are relatively stable over time, some results relating to the characteristics of short breaks might have changed since the September 2001 terrorist strikes for example.

## **Future Research**

This section focuses on four issues to propose a programme of study that would contribute to an enhanced understanding of RTO competitiveness. First, a limited window of opportunity exists to explore the implications of the recent history of Rotorua's tourism development. Second, the issue of positioning for domestic short breaks in New Zealand has been identified as an important area warranting increased attention. Third, further research is required to determine the appropriateness of a single destination positioning theme in all geographic markets and travel contexts. Fourth, the politics of RTO decision-making requires attention.

### **Rotorua's History**

As indicated in the previous section, the analysis of Rotorua's destination promotion evolution was limited in the main to a review of recorded history. Arguably the most prolific tourism development in Rotorua has taken place since the 1960s, and many active players from this era are still alive. The range of experience includes the following individuals for example:

- NZMACI Kaumatua Penekera Hona
- Guide Bubbles Mihinui of Whakarewarewa
- Retired Minister of Tourism and Rotorua MP Harry Lapwood
- Former Rotorua mayor John Keaney
- Former Rotorua mayor and director of Fairy Springs, Hell's Gate and Waimangu Volcanic Valley Ray Woolliams
- Historian and former city councillor Don Stafford,
- Retired Rotorua District Council general manager Ted Hansen
- Fishing entrepreneur and historian Alan Beamish-White
- Retired GTB assistant manager Bill Chandler
- Rainbow Springs developer Jack Mills
- Agrodome founder George Harford
- Former Rainbow Springs directors Max Martin and Mel Friend
- Former PRO Ernie Leonard
- Former deputy PRO Edie Vercoe
- Retired *Daily Post* editors Ian Thompson and Robin Mayston
- Former NZTP general manager Neil Plimmer
- Retired NTA director and Polynesian Pools developer Neville Lobb
- Retired NZTIA CEO Tony Staniford

A valuable but obviously limited opportunity exists to examine the politics, challenges and successes of Rotorua's destination promotion history from the perspectives of such key figures, some of whom are now in their 70s or 80s. History has a habit of repeating, and it is suggested lessons from the past might be of value to future decision makers of Tourism Rotorua and other RTOs. For example, Buhalis and Cooper (1998, p. 85) suggested one of the factors contributing to the decline of traditional destinations was "the past mistakes of planners, local authorities and entrepreneurs who failed to follow the dynamic progress of the tourism industry and to improve the infrastructure and superstructure". Therefore an opportunity exists for this 'corporate memory' of Rotorua's history as a tourism destination to be 'mined' for information.

## **Short Breaks**

The thesis highlighted the potential value of domestic short break holidays in New Zealand. There is clearly a need for more in-depth analyses of the characteristics of this type of holiday activity. In particular, the following are proposed:

- A longitudinal exploration of decision sets, intent, destination switching and actual travel.
- A qualitative study to identify short break motivations, as well as other characteristics such as the duration of short breaks, planning horizons, information sources, triggers, patterns of short breaks throughout the year, booking patterns, decision making responsibilities, composition of travel group membership, and the extent to which short breaks are taken, either in place of, or supplementary to, the traditional summer holiday
- Identification of the amount of short break holiday visitor nights from the aggregated CAM data for each destination. This would also require the CAM databases to be made available to researchers.
- An investigation of the significance of other types of short break options available to Aucklanders, such as domestic and international air packages.

## **Research in other Markets and Travel Contexts**

While the domestic market currently provides the largest number of visitors to Rotorua, it is the international markets that offer most potential for increased yield. However, given the 'two circuits' argument, differentiated marketing is necessary. More research needs to be undertaken on what visitors 'do' in Rotorua. It is likely to be sometime before an in-depth understanding is reached on how the destination is actually positioned in every segment in every market of interest. However, from Tourism New Zealand research data (see [www.tourisminfo.govt.nz](http://www.tourisminfo.govt.nz)), it is possible to specifically identify those segments most interested in the balance of commercial facilities and nature experiences offered in Rotorua. In targeting these segments one destination promotional theme would therefore be appropriate and effective. Such a strategy necessitates trade-offs in target markets and focused promotional themes. However, this could be overcome through the destination website, where it would be possible to tailor

sections to appeal to specific segments. RTOs would find it useful to understand how their destination is positioned in other geographic markets and travel contexts. This would further test the effectiveness of positioning themes, and go some way towards addressing the issue of whether one theme is suitable for all markets.

### **The Politics of RTO Decision Making**

Successful positioning requires a long-term commitment (Aaker and Shansby 1982, Chacko 1997, Woodside 1982): "An advertiser will often get tired of a positioning strategy and the advertising used to implement it and will consider making a change" (Aaker and Shansby, 1982, p. 62). The author's experience as Tourism Rotorua general manager included witnessing the move to change from 'Full of Surprises' promotional theme in 1995. This action was based on the whim of a few key tourism operators, rather than on any formal market research. Such a practise may not be uncommon in the tourism industry. For example, Ries and Trout (1986) used the example of Belgium's DMO changing a potentially successful positioning campaign to demonstrate that while positioning requires a long-term commitment, politics can inhibit this. While the tourism industry acknowledges the need for increased co-operation, implementation may often be problematic. Hall (1999) suggested tempering expectations of what could be achieved from collaborative tourism planning due to the narrow focus of, and dominance by, the larger corporate entities, to the detriment of other community stakeholders. Curtis (2001) also strongly recommended staying the course, since tourism marketers often make changes too quickly. The willingness of Tourism Rotorua to change its promotional theme without evidence of detailed research in its key markets, seems to imply prerogatives other than marketing may have been involved.

An investigation into the politics of RTO marketing decision-making, such as positioning trade-offs, would aid understanding of effective process and inhibitors to best practice. In New Zealand the effect of the proposed 'NewRTOs' on domestic promotion might be of interest.

## Managerial Implications for RTOs

In Chapter 1 it was suggested the success of individual tourism businesses depends, to a large extent, on the competitiveness of the destination. Therefore the thesis has wider implications than DMOs. That stated, this section is limited to a discussion on the practical implications of the results for RTOs.

The thesis represents an attempt to bridge the gap between academia and industry, since a feature is the applicability of the results for RTOs. However, it must also be stated that while the representatives of each RTO were interested in the results, there was a general lack of curiosity about the potential to mine the data. The timing of the author's RTO results meetings coincided with the planning stages of new domestic marketing plans for at least three of the five RTOs. Participants at the RTO meetings generally found the IPA matrices easy to follow, and agreed that the results provided a useful positioning snapshot for their destination. The results also represent the first data of domestic short break positioning for each of the RTOs. As discussed previously it was suggested to each of the RTOs that since no destination was explicitly staking acclaim as a place for short breaks, opportunities existed to do so. The first to respond with a major initiative was Tourism Bay of Plenty, which in February 2002, initiated a \$72,000 television campaign in the Auckland/Waikato region promoting short breaks to the destination. The author's personal thoughts on the academic/industry gap are articulated in Appendix F.

There was increased interest in domestic markets as a result of the September 2001 terrorist strikes. In New Zealand the impact of these events was immediate. For the month of October 2001 overseas visitor arrivals in New Zealand decreased by 3 per cent, in comparison to the same month of the previous year (see [www.statisticsnz.govt.nz](http://www.statisticsnz.govt.nz), 24/11/01). In particular the traditional markets of Japan and USA had decreased by 20 per cent each. The predicted downturn in international arrivals and general uncertainty caused many in the New Zealand tourism industry to reconsider the importance of domestic travellers, who it was felt might seek safer holidays closer to home. For example, following publication of

a few of the thesis' findings by Coventry (2001g), contact was made by two major inbound tour operators, who were both looking at developing domestic packages for the first time due to the uncertainty of overseas travel. By November 2001 many nations had announced plans to encourage residents to experience the travel options in their own country. In some cases campaigns were fronted at the highest level, such as George W. Bush.

By February 2002, the Pacific Asia Travel Association (PATA) had stated concern at the trend towards stronger domestic promotion in many PATA countries (PATA, 2002). The concern was due to the potential for discouraging outbound travel, resulting in lower inbound arrivals within the region, which would further impact on airline profitability. However, there were signs that overseas travel was recovering, with New Zealand's inbound arrivals increasing by 3 per cent during the month of January 2002 ([www.statisticsnz.govt.nz](http://www.statisticsnz.govt.nz), 20/3/02). It was also expected at this time that New Zealand would benefit from publicity surrounding the Lord of the Rings movie trilogy.

At the core of strategic planning is the competition (Porter, 1979). Competitors are part of the external macro-environment, over which an organisation has no control. For example, an RTO will have no control over the marketing initiatives or product developments of competing destinations. However, the RTO does have some control over the selection of which destinations to compete with in various target markets. It is suggested that effective positioning can enable this. In calling for a new paradigm in destination marketing, Heath (1999) promoted the need for destinations to move from broad based marketing to more targeted and customised positioning. Heath's proposed strategic planning framework for DMOs provided a simplified view of the hierarchical place of positioning within the strategic planning process, the importance of which was not explicit in Ritchie and Crouch's (2000b) descriptive model. Rotorua and Coromandel each occupied clear leadership positions for one of the four factors of destination attractiveness. The remaining two factors appeared crowded with no relative advantage to any destination. If another destination seeks to lay claim to the attractive positions occupied by Rotorua and Coromandel, the market needs to be convinced.

Rotorua must remain vigilant against increased marketing by competitors, particularly in niche areas. Opportunities exist for other regions such as Mount Maunganui to focus on short breaks while Tourism Rotorua is forced to spread its marketing interest far wider to cover emerging and developing markets. The alternative route to a leadership position would be through the development of a new position. Admittedly however, both options would require a focused commitment as well as significant resources by competing RTOs in the short term.

RTOs should devote attention to ToMA/decision sets and initiate tracking research. It is important to recognise that because the marketing environment is dynamic, decision set positions will change over time (Narayana and Markin, 1975). In Rotorua's case, the decision set results are positive, with the destination mentioned by over 60 per cent of respondents. Rotorua's superior results, most prominent for ToMA, appear to be correlated with actual visitor arrivals data for the year ending June 2001. If this result is generalisable to the wider Auckland population, there are two immediate implications for Tourism Rotorua. First, this represents a significant market base of opportunity for Rotorua to capitalise on. Tourism Rotorua must somehow keep in touch with those holding positive perceptions and continue to reinforce the determinant attributes, through affective associations. 'Feel the spirit Manaakitanga' is an affective association, but does not represent the determinant cognitive attributes.

The characteristics of respondents selecting each ToMA destination are generally consistent across geo-demographic categories. However there are some exceptions. For Rotorua there is a higher representation from those aged 35-49 years and those with three or more dependent children. This suggests Rotorua appeals most to family groups. Similarly, the domestic respondents of Moore, Fairweather and Simmons (2000), who were visitors to Rotorua, were predominantly travelling in family groups by private car, and staying for 1-3 nights. Second, the ToMA result represents a source of comparative advantage over competing destinations. This also enables the development of new target objectives, which could be introduced to 'raise the bar'. Given the high level of previous visitation an improvement in the number of ToMA and decision set

responses should be targeted. For example, the long-term vision could be to gain inclusion in the decision sets of all Aucklanders who intend taking a short break. This would stimulate more focused thinking by the domestic portfolio group in terms of quantifiable actions over time.

It was suggested to the RTO representatives the IPA results would provide additional accountability, through benchmarking. These benchmarks could then be compared to the results of future tracking studies. Few organisations have a formal image tracking system (Barich and Kotler, 1991). Barich and Kotler suggested factors dictating how often an image should be tracked include changes in the macro-environment and competitors' strategies, both of which have been evident since the questionnaire was distributed in May 2000. First, the events of September 2001 represent such a macro-environment event, which resulted in increased attention towards domestic markets. Second, since it was pointed out to the RTOs that none were explicitly targeting the Auckland short break market, it is anticipated that competitive strategies would change, as evidenced by Tourism Bay of Plenty's advertising. The new Tourism Bay of Plenty, effective from April 2002, represents increased competition, particularly in the domestic market. The dynamics of short break competition in Auckland may therefore have altered in the period since the data collection. Tracking research could increase accountability to stakeholders by providing performance measures for future promotional activity. Depending on the regularity of tracking research, and given that destination image is thought to change only slowly over time, it may be possible to determine the time periods taken for promotional campaigns to be effective in changing perceptions.

Measuring performance is arguably one of the most neglected aspects of destination marketing (Heath, 1999). Benchmarking the thesis results would be an important contribution, particularly given the difficulty in quantifying the effectiveness of RTO efforts in causing actual travel (see Faulkner 1997). For example, Curtis (2001) noted the initial evaluation of a major campaign undertaken by the Oregon Tourism Commission was limited to the number of resultant enquiries and the advertising industry awards. For later campaigns,

conversion studies were used to track the return on investment (ROI). While the studies showed every advertising dollar generated up to \$20 in visitor spending, ROI ratios missed the influence of campaigns on future travel. In New Zealand Moore, Fairweather and Simmons (2000) found a lack of travel literature used by domestic visitors to Rotorua. This was the same finding as (NZTP, 1981) who observed New Zealanders were do-it-yourself travellers. Similarly, McWilliams and Crompton (1997) found only a minority of domestic travellers in the USA requested information from a DMO. They concluded conversions studies of advertising responses would be misleading.

For Rotorua stakeholders there are disappointing importance ratings for five attributes, which have been regarded locally as strengths, but which rated below the scale mid-point. These are: 'Maori cultural experiences', 'adventure activities', 'close to other holiday destinations', 'shopping' and 'fishing'. Two possible explanations are offered. First, two of the five attributes could be regarded as niche activities, since it would not be reasonable to expect the wider population to be interested in 'fishing' and 'adventure activities'. Second, travel context may be an issue. For example respondents might be expected to rate 'Maori culture experiences' considerably more important if the context was escorting overseas visitors around New Zealand. Pike and Ryan (2003) observed that since tourism is supposed to play a role in bridging gaps between cultures, Rotorua appeared to be failing in this regard. They suggested the emphasis on 'traditional authenticities' aimed at overseas markets missed the contemporary vibrant nature of Maori music and dance that might have a wider appeal, including the domestic market. A Maori equivalent of Michael Flatley's 'Riverdance' may be one solution. Similarly, Moore, Fairweather and Simmons (2000) suggested a more educational or experiential presentation might increase domestic patronage.

Surprisingly, 'Good weather' was mentioned by only three of the 11 practitioners. It may be that on the supply side, practitioners consider the weather to be similar across the competing regions. However, it is felt potential travellers may in fact differentiate destinations on the basis of perceived weather differences. Perhaps the availability of attractions and activities during inclement weather, as in the 'the

weather' factor developed in Chapter 6 is pertinent? After all, New Zealand's temperate climate means the weather must be an important travel consideration. Therefore more all-weather facilities would represent a source of comparative advantage for destinations. Certainly, the European experience has shown that the larger self-contained resorts do not need to be based at a leading destination to be successful. In this regard, the Auckland region could emerge as a greater threat, given the economic advantages to be gained from developing such a resort close to New Zealand's largest urban population. Fache (1990) for example pointed to the increasing importance of all-weather holiday 'villages' in Europe, particularly the subtropical water-leisure centres. For one major chain, Centre Parcs, three-quarters of the business was short breaks. These types of resorts would have a particular attraction for families, with the inclusion of day-care facilities and all-weather activities. Such a holiday is still generally family time, but can also be combined with the need for individual pleasure (Mollo-Bouvier, 1990). The self-contained nature of the village experience, as with cruise ships, may be an example of Popcorn's (1996) 'cocooning' trend. This is an issue that Tourism Rotorua could explore, given Rotorua rated lowest of the five destinations for 'weather'.

'Shopping' may not be important during a short break, in comparison to the traditional longer summer holiday that may take in the post-Christmas sales. Regarding Rotorua's performance for this attribute, the lack of extended shopping hours may be the issue. A number of criticisms have been made of retailers' lack of opening hours to suit visitors. This criticism is often from within the ranks of the retailers. This was summed up in a comment by Rotorua Retail Advisory Committee member Rod Meharry, suggesting that visitors arrive in Rotorua on a weekend to find the shops all closed: "It's disgraceful for a city trying to promote itself as New Zealand's number one tourist spot. Shopping is a vital part of tourism, they go hand in hand" (Rotorua Daily Post, 7/8/98). Similarly, Horn, Fairweather and Simmons (2000) found in interviews with Rotorua tourism operators a major concern was the poor opening hours of retailers, particularly on weekends.

## **Critical Success Factors**

A number of critical success factors for Rotorua's future as an attractive domestic short break destination are proposed. These include positive attitudes of the host community, the importance of repeat visitation, increased value pricing, effective positioning and more explicit targeting of the domestic short break market.

### **Positive Attitudes of Host Community**

Many destination promotion themes are not consistent with residents' perceptions (Laws, 1995). This is important since any sustained destination competitiveness demands strong support from the host community. It is speculated, from a number of discussions with tourism degree students at Rotorua's Waiariki Institute of Technology, that local residents might have difficulty in firstly articulating a meaning for 'Feel the spirit Manaakitanga', and secondly agreeing that it is a truthful representation of the community in which they live. With over 300,000 annual visitors staying in private accommodation, Rotorua residents represent a considerable army of ambassadors for the destination's promotional cause. A shared vision and theme would represent a powerful resource.

Research into the social costs of tourism has been limited (Hall, 1995). As with any non-financial 'impact' of tourism, measurement is problematic, which is perhaps one of the reasons limited if any research has been undertaken in Rotorua. Nevertheless, there has been certainly been enough discussion on the potential social impacts of tourism, both positive and negative (see for example Hall 1995, Hashimoto 2002, Holloway 1994, Mill and Morrison 1992), for RTOs to be aware of the pitfalls. Negative impacts on the host community can include for example: increased crime, family breakdowns, prostitution, gambling, loss of a sense of ownership of place, increased congestion and other impacts on lifestyle, and denigration of indigenous culture. The poor result for Rotorua's 'friendly locals' signals a need for attention in this area by Tourism Rotorua. Although some quantitative data has been collected on Rotorua residents' perceptions of tourism, as discussed in Chapter 3, a qualitative investigation appears warranted. It is acknowledged the politics of destination marketing demand a focus on

promotional activities by RTOs, and that given the dearth of market research being undertaken would relegate any local social impacts to a low priority. However, opportunities exist for a pilot study by one or more of the growing number of post-graduate tourism students from universities nationwide. A useful combination of projects could involve, for example: interviews of domestic visitors directed by questions relating to host attitudes, focus groups of local residents to discuss attitudes towards visitors and awareness of 'Feel the spirit Manaakitanga', combined with a survey of Rotorua households designed to replicate a social impact model from the literature, such as Doxey's (1975) irridex. The results could then be used to stimulate discussion with the tourism industry to determine the future course of social impacts measurement.

In the meantime, in terms of remedial action, there is perhaps a need to reactivate the Tourism Rotorua-led 'local pride campaigns' of the late 1980s and early 1990s, if an improvement in 'friendly locals' is desired. Initiatives included, for example, a district-wide open day of tourism attractions, a 'Good Host Kit' delivered to every Rotorua household, local newspaper advertising, talks at local schools and service clubs and regular columns in *The Daily Post* and *Rotorua Review*. There is also a need for a vision relating to quality standards of local businesses. There should be increased support for, and promotion of, service quality programmes. New Zealand travellers are sophisticated consumers, who, recognising they have a wide choice of destinations, will increasingly gravitate to those places that provide service excellence. Rotorua is small enough for campaigns targeted at local businesses to be effective. These could encompass existing initiatives such as KiwiHost and Qualmark, as well as wider community involvement through increased linkages between industry and academic institutions. Also, a significant reduction in levels of crime against visitors is necessary. This would require increased policing of tourist zones, including more proactive initiatives from the tourism industry and increased industry liaison with community groups such as the Maori Wardens. The tourism industry could also be more honest and open about crime levels, by issuing higher profile warnings to visitors.

## **Repeat Visitation**

While the high level of previous visitation to Rotorua by respondents was unexpected, this result did highlight the issue of repeat visitation. Repeat purchase behaviour was introduced in the marketing literature during the 1940s (Howard and Sheth, 1969). However, little research has been undertaken in the area of destination loyalty (Oppermann, 1999b). Two immediate considerations are recommended. First, it would be beneficial for Tourism Rotorua to investigate opportunities for keeping in touch with repeaters. Second, to maintain repeat short break visits, there will be a need for new product developments. In particular it is suggested that new attractions appealing to families be stimulated. Arguably, there has been no major visitor attraction developed in Rotorua since the opening of Skyline Skyrides and Rainbow Farm during the 1980s. Rotorua District Council needs to provide increased support for tourism entrepreneurs, to facilitate access to capital and assistance with Resource Management Act procedures.

## **Increased Value Pricing**

There is a need for increased value pricing to attract domestic travellers. It must be recognised that, in general, New Zealand incomes are low relative to the spending power of international visitors. The gap between the means for importance of 'good value for money' (5.99) and Rotorua's performance (5.03,  $t = 15.816$ ,  $p < .001$ ) should be sufficient to stimulate more discussion about perceived value. This attribute was the main differentiator between Rotorua and the other destinations in the individual IPA matrices. Rotorua's positive performance was also reinforced in a number of respondents' comments, such as:

*In the highly tourist based areas eg Rotorua, Queenstown etc, have 'locals' rates for activities/shows etc as it will act as an incentive to take friends or relatives. Eg show a rates bill or something similar and receive a discount. (Respondent 125).*

*We recently had a family holiday at Rotorua (13 people). We had a budget, but all entertainment was so expensive even down to watching a sheep show. There should be more concession prices for large groups or families. Another family restaurant like Cobb & Co, where you can get a meal (not takeaways) for \$10-15 & children \$5 or \$6. (Respondent 712).*

This may be indicative of any place where product pricing becomes oriented towards overseas markets whose travellers find New Zealand inexpensive due to favourable exchange rates. Dual pricing is one option that could be debated within Rotorua's tourism industry. Discussions could focus on the philosophy of adopting such a system, as well as implementation considerations.

### **Effective Positioning**

Positioning should be the platform from which all the RTO's other activities flow. Clearly this has implications not only for advertising but also, given the previous discussion, for educating stakeholders and stimulating consistent delivery. After all, the promised position must be delivered. This is particularly important in the domestic market, given the influence of word of mouth recommendations and the effect of experience and familiarity. Again, given the relatively poor result for Rotorua's 'friendly locals', the question must be asked: is 'Feel the Spirit Manaakitanga' delivered and reinforced during a domestic visitor's stay? The following are recommended to enhance positioning effectiveness:

- An understanding of the benefits sought by the target audience, and the relative performances of the competitive set of destinations.
- Trade-offs for a focused positioning strategy based on determinant attributes.
- Implementation to 'cut-through' and stimulate intent (demand).
- The delivery and monitoring of benefits offered by the position.
- Performance measures to track effectiveness over time.
- Staying in touch with target audience needs.

It is suggested that like the 1980s 'Sparkling Rotorua' theme, the current 'Feel the spirit Manaakitanga' is an attempt to represent something the destination might previously have been and might again be one day, but is not currently, at least in the Auckland market. While Rotorua's long history of hospitality is acknowledged, this reputation has been tarnished by crime against visitors and aspects of commercialism such as price and quality standards. One of the reasons destinations have been portrayed in such an overly positive and glossy manner by

the travel industry is that mass tourism was sold as escapism, where travellers would not be interested in potential problems with a destination (Britton, 1979). A new umbrella theme for Rotorua is required that still incorporates Maori culture and geothermal, but is perhaps more honest about the combination of commercialism, culture and nature.

Place promotion has seen few creative ideas, with most campaigns failing to avoid much more than ephemeral indifference (Gold and Ward, 1994). Gold and Ward suggested clichés and imitation dominate. Similarly, Pearce (1988, p. 168) proposed there can be much commonality in promotional descriptions of in quite diverse destinations: "There is an international language of tourism advertising which promotes similar sorts of images for widely different destinations". A recent example of this was New Zealand's Bay of Plenty and Australia's Gold Coast, both of which were using 'The Coast with the Most' theme in 2000. Also, by 2000, the RTOs for Rotorua, Dunedin and Southland were using the word 'spirit' in their straplines. At least two of these RTOs used the same brand consultant. The themes may or may not have been partly based on Pritchard and Morgan's (1998) recommendation that a brand should convey the 'spirit' of the destination. The theme also bears a striking resemblance to North Dakota's 'Discover the spirit', which Richardson and Cohen (1993) categorised as not representing a unique selling point. The difficulty faced by DMOs in attempting to promote 'difference' and avoiding hyperbole was recognised by Dann (2000, p. 65):

*Undoubtedly the greatest problem of all though, is the perennial and unresolved question of constructing a message that is both credible and responsible. If difference is to be projected in order both to satisfy growing demand for novelty and to eliminate old and emerging rivals, is there not a tremendous danger of cherry-picking reality to the point where it becomes unreal, of degenerating into hyperbole and of irresponsibility portraying a destination and its people without taking their self-image or the true motives of tourists into full consideration?*

It has been argued in the thesis that positioning represents a potential source of advantage for destinations, and that effective positioning requires a focus on communicating and delivering unique benefits of value to the target. It is only

through such a position that the potential substitutability of destinations offering similar benefits can be overcome. From the results it is suggested 'Feel the Spirit Manaakitanga' does not provide a clear and focused message about the nature of the unique benefits(s) offered by Rotorua as a domestic short break destination. Will 'Feel the spirit Manaakitanga' achieve more than ephemeral indifference? What determinant attributes does it represent? In the limited time available to gain cut-through to the busy mind of the traveller, is there time to explain the meaning of Manaakitanga? The theme therefore represents an example of attempting to change people's minds rather than to reinforce positively held beliefs and feelings. Rotorua was rated best destination on four determinant cognitive attributes: 'suitable accommodation', 'good value', 'cafes/restaurants', and 'lots to see/do', as well as for the affective dimension 'exciting'. Since the quickest route to the mind is to reinforce positive perceptions, these must be considered for future communications in the Auckland market.

### **More Explicit Targeting of the Domestic Short Break Market**

Short breaks represent an opportunity to spread the economic benefits of visitor spending around the host community. If, in Rotorua, there are different circuits used by international and domestic visitors, then increased domestic visitors will help offset the predominance of overseas visitors' spending at the main attractions. This would also spread congestion and environmental impacts. Since new operators often 'cut their teeth' on the domestic market before breaking in to overseas markets it is an important responsibility for the RTO to stimulate this business. Short breaks are demand driven, and the thesis findings suggest RTOs are missing a significant opportunity by not more explicitly targeting this valuable market segment.

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# **Appendices**

## **Appendix A - Summary of 142 Destination Image Papers (1973-2000)**

Author	Date	Context	Region	A	Type	B	C	D	E	Sample	Other Focus
Mayo	1973	Self drive	Nth America	8	State	1		670	P	Visitors	Impulse
Anderssen & Colberg	1973	Winter	UK/Europe	9	Resort	8		50	FP	Students	Segmentation
Matejka	1973		Nth America	1	State	20		82	O	Consumers	
Gearing, Swart & Var	1974		UK/Europe	65	Other	17		1	O	Trade/Experts	
Hunt	1975		Nth America	4	State	20		1262	A	Consumers	
Riley & Palmer	1975		UK/Europe	25	Resort		U	60	GFC	Consumers	
Ehemann	1977		UK/Europe	1	Country			0	O	N/A	Negative media
Var, Beck & Loftus	1977		Nth America	19	Other	17		60	O	Trade/Experts	
Pearce	1977		UK/Europe	1	City		U	72	M	Visitors	LOS. Differences
Goodrich	1977 1978a 1978b 1979		Nth America Central America	9	State, Country	10	U	230	PCF	Consumers	Segmentation
Ritchie & Zins	1978		N/A	1	Other	20	U	135	F	Trade/Experts	Culture
Scott, Schewe & Frederick	1978		Nth America	4	State	18		313	C	Visitors	Distance
Pizam, Neumann & Reichel	1978		Nth America	1	City	32	U	685	F	Visitors	
Palmer	1978		UK/Europe	10	Other		U	60	GP	Consumers	
Crompton	1979b		Central America	1	Country	30	U	617	A	Students	Distance
Ferrario	1979		Africa	1	Country	21		5053	A	Visitors	
Pearce	1982		UK/Europe, Africa	2	Country	13	U	97	G	Visitors, Consumers	Visitation
McLennan & Foushee	1983		Nth America	1	Country	12		221	A	Trade/Experts	Negatives
Haahti & Yavas	1983		UK/Europe	12	Country	10	U	681	A	Visitors	
Morello	1983		Nth America, UK/Europe	8	Country	12		66	O	Students	Affect
Jaffe & Nebenzahl	1984		Nth America, Asia UK/Europe, Africa	5	Country	13		200	O	Consumers	Scale validity
Crompton & Duray	1985		Nth America	1	State	28	U	544	I	Consumers	
Silberman	1985		Nth America	1	Resort	7		621	O	Visitors	LOS
Wee, Hakam & Ong	1985		Asia	1	Country	14		218	T	Visitors	Visitation
Witter	1985		Nth America	1	Resort	10		375	TF	Visitors, Local	Differences
Kale & Weir	1986		Asia	1	Country	26		90	A	Students	Negatives
Dillon, Domzal & Madden	1986	Spring break	Nth America Central America	7	Country, Resort	20	U	80	P	Students	
Perdue	1986	Boating	Nth America	3	Other	12	U	430	O	Consumers	
Gartner	1986		Nth America	4	State	13		1917	T	Consumers	Temporal
Shih	1986		Nth America	1	State	37		1591	A	Consumers	Segmentation
Phelps	1986		UK/Europe	1	Resort	32		97	C	Visitors	Visitation
Gartner & Hunt	1987		Nth America	4	State	11		1917	T	Consumers	Temporal
Botterill & Crompton	1987		Central America	1	Country		U	1	G	Visitors	Personal photos
Fridgen	1987		Nth America	9	Province		U	N/A	M	Visitors	Familiarity
Davis & Sternquist	1987		Nth America	1	Resort	10		306	C	Visitors	Segmentation

Woodside & Carr	1988	Convention	N/A	3	Country		U	30	S	Consumers	Decision sets
Richardson & Crompton	1988		Nth America	2	Country	10		624	O	Consumers	Culture
Gartner	1989		Nth America	4	State	15		N/A	P	Consumers	
Woodside & Lysonski	1989	Foreign travel	Australasia	0	Country		U	92	S	Students	Decision sets
Teye	1989		Nth America	1	State	12	U	326	A	Trade/Experts	Intermediaries
Botterill	1989		Asia	1	Country		U	1	G	Visitors	Visitation
Calantone et al	1989		Asia, Sth Pacific	8	Country	13		363	P	Visitors	
Embacher & Buttle	1989	Summer	UK/Europe	2	Country		U	25	GC	Consumers	
Yau & Chan	1990		Asia	7	City	31		600	PF	Visitors	
Roehl	1990		Asia	1	Country			80	O	Trade/Experts	Event impact. Intermediaries
Stabler	1990b		UK/Europe	9	Resort	13		964	O	Visitors	Induced
Tang & Rochananond	1990		Asia	32	Country	8		339	A	Visitors, Trade Experts	
Reilly	1990		Nth America	1	State		U	1224	A	Consumers	
Driscoll & Lawson	1990		Nth America, Sth Pacific, UK/Europe, Asia, Australasia	12	Country	18	U	1099	P	Consumers	Segmentation
Chon	1990 1991		Asia	1	Country	26		444	T	Visitors	Visitation
Chon, Weaver & Kim	1991	Short break	Nth America	1	City	15	U	401	I	Consumers	
Pizam, Jafari & Milman	1991		UK/Europe	1	Country	33		62	T	Students, Visitors	Visitation
Bojanic	1991		UK/Europe	1	Country	20		2000	A	Consumers	Induced
Ahmed	1991		Nth America	1	State	22		1782	FT	Consumers	
Fakeye & Crompton	1991		Nth America	1	Province	32		568	FT	Consumers, Visitors	Visitation. LOS. Distance
Echtner & Ritchie Echtner & Ritchie	1991 1993		UK/Europe, Central America, Africa, Asia	4	Country	35	U	600	F	Students	
Crompton, Fakeye & Lue	1992	Winter longstay	Nth America	1	Province	32	U	568	F	Consumers, Visitors	
Dadgostar & Isotalo	1992 1995		Nth America	4	City	11	U	260	O	Consumers	Distance
Gartner & Shen	1992		Asia	1	Country	32		299		Consumers	Event impact
Walmsley & Jenkins	1992		Australasia	1	Resort			115	M	Visitors	
Javalgi, Thomas and Rao	1992	Self drive	UK/Europe	4	Other	27		9000	F	Consumers	
Gronhaug & Heide	1992		UK/Europe	1	Country	22		88	A	Students	Stereotypes
Hu & Ritchie	1993	Education travel	Nth America, UK/Europe, Australasia, Asia,	5	Country	16		400	T	Consumers	Context. Visitation
Ross	1993		Australasia	1	Province			400	O	Visitors	Budget travellers
Walmsley & Jenkins	1993		Australasia	8	Resort	6	U	96	GF	Visitors, Trade/Experts	Affect

Manrai & Manrai	1993		UK/Europe	10	Country	30	U	211	FPT	Consumers	Experience. ToMA
Gartner & Bachri	1994		Asia	1	Country	19		51	AO	Trade/Experts	Intermediaries
Husbands	1994		Africa	1	Country	10		135	P	Visitors	
Driscoll, Lawson & Niven	1994		Nth America, Sth Pacific UK/Europe, Asia, Australasia	12	Country	18	U	1099	T	Consumers	Scale reliability
Amor, Calabug, Abellan & Montford	1994	Sun/beach	UK/Europe	1	Province		U	N/A	O	Visitors, Trade/Experts	Barriers
King	1994	Sun/beach	Australasia, Sth Pacific	2	Resort		U	60	O	Consumers, Trade/Experts	Distance
Young	1995		Australasia	10	City, Resort, State, Province	7	U	180	GF	Consumers	Affect
Weber & Mikacic	1995		UK/Europe	6	City	26			I	Visitors	
Milman & Pizam	1995		Nth America	1	Province	18	U	750	A	Consumers	Familiarity
Mazanec	1995		UK/Europe	26	City	6			P	Consumers	Temporal
Illum & Schaefer	1995		Nth America		Other	33	U	375	A	DMO staff, Trade/Experts	Differences
Oppermann	1996b	Convention	Nth America	30	City	15		123	IF	Trade/Experts	
Ahmed	1996		Nth America	1	State	20		1917	F	Consumers	Familiarity
Dann	1996		Central America	1	Country		U	535	O	Visitors	Visitation
Bramwell & Rawding	1996		UK/Europe	5	City				O	DMO staff	Induced
Waitt	1996		Australasia	1	Country	25	U	864	F	Students	
Selby & Morgan	1996		UK/Europe	1	Resort				O	Consumers, Visitors	DMO policy
Mazanec	1997		UK/Europe		City	23			O	Visitors	Segmentation
Andersen, Prentice & Guerin	1997		UK/Europe	1	Country		U	780	O	Consumers	Culture
Court & Lupton	1997		Nth America	1	State	24		903	FT	Consumers	Intent
Murphy & Pritchard	1997		Nth America	1	City	4		10531	A	Visitors	Price-value
Baloglu	1997		Nth America	1	Country	34		330	F	Visitors	Demographics
Baloglu & Brinberg	1997		UK/Europe	11	Country	4		60	FP	Students	Affect
Grabler	1997a		UK/Europe	6	City	12		282	FP	Consumers	
Grabler	1997b		UK/Europe	77	City			40	O	DMO staff	
Go & Zhang	1997	Convention	Asia	1	City	22	U	61	F	Trade/Experts	
Lawton & Page	1997		Australasia	1	City			170	O	Visitors	Differences
Pritchard	1997		Australasia	1	State	13	U	200	I	Visitors	
Mackay & Fesenmaier	1997		Nth America	1	Other	34	U	257	TF	Consumers, Visitors	Induced
Bignon, Hammitt & Norman	1998		Nth America	1	Country	34		639	FC		
Illiewich	1998		UK/Europe	6	City	35		282	F	Consumers	
Hudson & Shephard	1998	Skiing	UK/Europe	1	Resort	97	U	151	I	Visitors	
Lubbe	1998		Africa	1	Country		U	29		Trade/Experts	Primary image
Walmsley & Young	1998		Nth America, Sth Pacific UK/Europe,	16	Country, Other	6		82	F	Consumers	Affect

			Asia, Australasia								
Dimanche & Moody	1998		Nth America	1	City	30		107	AT	Trade/Experts	Differences
McLennan	1998	Short break	UK/Europe	1	Province	N/A		911	O	Consumers, Visitors	Visitation
van Limburg	1998		UK/Europe	1	City	4		45	Q	Consumers	
Kozak & Nield	1998		UK/Europe	1	Resort	11	U	268	I	Visitors	Less developed destinations
Santos	1998		Asia	1	Country			36	O	Trade/Experts	Induced. Intermediaries
Brown	1998		Central America, Africa, Sth America	3	Other	53		2469	F	Consumers	Differences
Tribe & Snaith	1998		Central America	1	Resort	56		102	T	Visitors	
Ritchie	1998	Bicycling	Australasia	1	Other	13	U	321	FIT	Visitors	
Yannopoulos & Rotenberg	1999		Nth America	1	Province	13		201	F	Visitors	Distance
Chen & Kersletter	1999		Nth America	1	State	48	U	329	F	Students	Rural
Nickerson & Moisey	1999		Nth America	1	State	20	U	5783	C	Visitors	
Schneider & Sonmez	1999		Africa	1	Country	12		65	T	Visitors	Less developed destinations
Shanka & Frost	1999		Africa	1	Country		U	536	O	Students, Trade/Experts	Less developed destinations
Vaughan & Edwards	1999	Winter	UK/Europe	2	Resort, Country	17		438	T	Visitors	Affect
Lohmann & Kaim	1999		UK/Europe	6	Province	10		7543	O	Consumers	Weather
Baloglu & McCleary	1999a 1999b	Summer	UK/Europe, Africa	4 4	Country	14 14		356 448	FO A	Consumers	Image formation. Visitation
Mohsin & Ryan	1999		Australasia	1	State	6	U	38	P	Trade/Experts	Intermediaries
Murphy	1999	Backpacking	Australasia	1	Country	8	U	383	P	Visitors	
Young	1999		Australasia	1	Province		U	879	FC	Visitors	Motivation
Dolnicar, Grabler & Mazanec	1999		UK/Europe	3	City	20		632	P	Visitors	
Botha, Crompton & Kim Kim, Crompton & Botha	1999 2000		Africa	1	Resort	20	U	302	TF CF	Visitors	Decision sets. Target Markets
Chaudhary	2000		Asia	1	Country	20	U	152	T	Visitors	Visitation
Murphy, Pritchard & Smith	2000		Nth America	1	City	16		610	O	Visitors	Value/quality
Uysal, Chen & Williams	2000		Nth America	10	State	48		1318	I	Consumers	
Lee	2000		Nth America	3	Resort, Country	14		458	A	Consumers	
Heung & Qu	2000		Asia	1	City	31		522	F	Visitors	
Chen & Hsu	2000		Asia		Other	17		265	AO	Consumers	
Mackay & Fesenmaier	2000		Nth America	1	State	9		10	P	Students	Cross-culture
Tapachai & Waryszak	2000		Nth America, Asia	2	Country	16	U	247	O	Students	
Reisenger & Turner	2000		Nth America, Australasia	2	State, Resort	27		663	FT	Visitors	Differences
Perdue	2000		Nth America		Resort		U	2869	O	Consumers	Confidence
Jutla	2000		Asia	1	City		U	100	O	Visitors, Local	Differences
Andreu, Bigne & Cooper	2000		UK/Europe	9	Resort, City	6	U	120	C	Visitors	Visitation

Chacko & Fenich	2000	Convention	Nth America	7	City	12	U	291	O	Trade/Experts	Intermediaries
Pritchard & Walkup	2000		Australasia	1	State		U	1284	O	Visitors	

## KEY:

A: Number of destinations of interest

B: Number of attributes used as independent variables

C: Unstructured studies (U)

D: Sample size

E: Data analysis techniques: analysis of variance (A), cluster analysis/discriminant analysis (C), factor analysis, repertory grid (G), importance-performance analysis (I), mapping (M), other (O), perceptual mapping/multidimensional scaling (P), conjoint analysis (Q), ranking/preferences (R), constant sum (S), t-tests (T)

# Appendix B - Repertory Grid Raw Data

Subject ID	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Number of triads used	8	9	7	6	11	9	6	8	7	5	20	13	19	11	11
Number of statements elicited	13	22	22	18	31	24	22	21	23	19	26	23	25	16	26
Interview duration (minutes)	25	20	20	25	30	30	20	20	20	20	40	30	25	20	25
<b>Verbal Label</b>															
For older versus younger people	1	1	1	1		1	1	1							
Natural attractions	1	1													
Adventure activities	1				1	1					1	1			
<b>More tourists/touristy</b>	1	1	1	1	1	1	1	1		1	1	1			1
Towns/cities	1		1				1								1
More attractions	1	1	1		1			1		1	1				
<b>More water related activities</b>	1	1			1	1	1	1	1		1		1	1	1
<b>Better promoted</b>	1		1	1	1				1			1	1		1
<b>Relaxing</b>	1		1	1	1	1	1	1	1	1	1		1	1	1
<b>Skiing/snow/snowboarding</b>	1	1	1	1	1	1	1	1	1		1		1		1
<b>Wine/vineyards</b>	1				1			1				1		1	1
Unique features	1				1				1				1		
Tourism not major industry	1														
South of Auckland vs north		1									1				
<b>Driving distance</b>		1	1	1		1		1	1	1		1	1	1	1
<b>Summer vs winter locations</b>		1	1	1		1						1	1		1
Exciting vs boring		1					1	1			1				
<b>Good beaches</b>		1	1	1	1	1	1	1	1		1	1	1		1
<b>Close together/visit both</b>		1	1	1	1	1			1	1		1	1		1
Surfing		1			1	1							1		1
Lying in the sun		1										1			
Family oriented		1				1	1				1				
Remember school trips there		1													
Pubs/nightlife		1	1			1									
<b>Hiking/walking/tramping</b>		1			1		1	1		1	1	1	1		1
Events		1			1	1									
Price		1	1							1			1		1
<b>Lots to do</b>		1	1	1		1		1	1	1				1	
<b>Coastal vs inland</b>		1			1	1		1				1	1	1	
Action				1											
Shopping				1	1						1		1		
Swimming areas				1											
A bit of everything				1											
Have family there				1	1					1		1			
Friendly people				1			1								
Opportunity to meet locals				1											
<b>More familiar</b>				1	1			1	1	1	1	1		1	
<b>Fishing</b>				1	1	1	1	1	1	1			1	1	1
Access to bachs				1	1										
Rural				1	1		1					1	1		1
Range of activities				1			1	1							
Options for different times of year				1											
Diving					1					1					
Off the beaten track					1						1	1			1
Volcanic sights					1				1			1		1	1
East of Auckland					1						1		1	1	
Scenic views					1										
Fruit/orchards					1		1						1		
<b>Good weather</b>					1		1	1	1			1	1	1	
Ports					1										

16	17	18	19	20	21	22	23	24	25	<b>Total</b>	<b>Mean</b>			
14	14	16	20	8	12	11	12	8	19	<b>284</b>	<b>11.4</b>			
28	23	35	31	16	24	25	21	13	20	<b>567</b>	<b>22.7</b>			
20	25	25	35	15	20	20	20	15	25	<b>590</b>	<b>23.6</b>			
		1								8	32%			
			1							3	12%			
			1							6	24%			
		1	1		1	1	1		1	1	19	76%		
						1			1	6	24%			
			1							8	32%			
		1	1	1	1	1	1			17	68%			
			1	1	1	1	1			13	52%			
		1		1	1	1			1	18	72%			
1	1					1	1			16	64%			
1		1	1			1	1			11	44%			
1			1			1	1			8	32%			
										1	4%	134	23.6%	
		1				1	1		1	6	24%			
1	1	1	1	1	1	1	1	1	1	21	84%			
						1	1		1	10	40%			
1										6	24%			
	1	1	1	1		1			1	1	18	72%		
1		1		1	1	1	1		1	17	68%			
			1					1	1	8	32%			
										2	8%			
		1				1		1		7	28%			
									1	4	16%			
	1	1	1	1	1	1		1	1	16	64%			
			1		1					5	20%			
										5	20%			
1	1		1	1		1	1	1		14	56%			
			1	1	1	1			1	12	48%	286	50.4%	
										1	4%			
1		1								6	24%			
1	1	1						1		5	20%			
										1	4%			
1									1	1	7	28%		
										2	8%			
										1	4%			
	1								1	1	11	44%	320	56.4%
1	1	1	1	1	1			1	1	1	19	76%		
	1	1							1		5	20%		
			1					1		8	32%			
										3	12%			
										1	4%	356	62.8%	
										3	12%			
									1	1	6	24%		
									1		6	24%		
		1								5	20%			
		1	1	1		1				5	20%			
1		1		1	1	1	1	1	1	1	15	60%		
										1	4%			



## Appendix C - Questionnaire

25 June 2000

Hello

Attached is a questionnaire that is part of a study of Aucklanders' **short break holiday** preferences. The purpose of this research is to assist the tourism industry develop a better understanding of your holiday needs.

Your household was randomly selected from the 1999 Auckland telephone directory. It would be appreciated if the questionnaire could be completed by the adult (18 years and over) in your household who will next celebrate their birthday.

The questionnaire takes approximately 15 minutes to complete. Participation is voluntary, and all information you provide will be treated confidentially.

There are two parts to the questionnaire. Please complete Section A before reading and completing Section B.

Also enclosed is a **prize draw for two nights accommodation** at a mystery four-star hotel, within a short drive of Auckland. The accommodation is for two people and includes breakfasts. Transport to the hotel is not included. The winner will be notified by mail, and the result published in the NZ Herald on Saturday August 5<sup>th</sup>. To enter, please return your completed questionnaire and entry form, in the reply paid envelope provided, by Friday July 28<sup>th</sup>, 2000. No stamps are required.

Our definition of a short break holiday is a non-business trip, using a car, of between one and three nights away.

Thank you in advance for your support. If you have any questions, please don't hesitate to contact me.

Regards

Steve Pike

DDI phone: 07-346 8655 E-mail: [steve.pike@wairiki.ac.nz](mailto:steve.pike@wairiki.ac.nz)

**P.S. Don't forget to enter the prize draw of a weekend for two at a mystery location.**

## **A Study of Short Break Holiday Preferences**

# **SECTION A**

**Please complete Section A before reading Section B.**

**Thank you for your help.**

1. What is the likelihood of you taking a short break holiday (of 1 to 3 nights), travelling by car, during the next 12 months? (Please circle the appropriate statement):

Definitely not	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Definitely
----------------	---------------	----------	-----------------------------	--------	-------------	------------

2. What do you consider to be the maximum comfortable driving time, in hours, from your home to a short break holiday destination?

\_\_\_\_\_

3. On average, how many times a year would you travel by car for a short break?

\_\_\_\_\_

4. Please circle one number, for each of the following, to indicate the importance to you as a reason for taking a short break holiday by car.

	Not applicable	Not important	1	2	3	4	Very important
To visit friends and relatives	0	1	2	3	4		
For a break from routine	0	1	2	3	4		
For relaxation	0	1	2	3	4		
To attend an event	0	1	2	3	4		
Spend time with my children	0	1	2	3	4		
For excitement/action	0	1	2	3	4		
To meet new people	0	1	2	3	4		
For romance	0	1	2	3	4		
To explore/learn new things	0	1	2	3	4		
See places my friends haven't	0	1	2	3	4		
To educate my children	0	1	2	3	4		

5. Of all the short break holiday destinations that would be available for you to visit in the next 12 months, if you were driving, which destination first comes to mind?

\_\_\_\_\_

6. What other destinations would you probably consider for your next short break holiday, if you were driving?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

7. We are interested to know how important a number of features of holiday destinations are to you when taking a **short break holiday by car**. Please rate each of the features using the following numbers:

0 No opinion/ Don't know	1 Of no importance	2	3	4 Moderately important	5	6	7 Very Important
--------------------------------	--------------------------	---	---	------------------------------	---	---	------------------------

For example, if you believe that it is essential for a short break holiday destination to be “a comfortable drive from home”, you would circle 7, as shown:

A comfortable drive from home

0      1      2      3      4      5      6

7

Please circle **one** number for each of the following destination features, to indicate how important each is for you when planning a short break holiday.

A comfortable drive from home	0	1	2	3	4	5	6	7
Good weather	0	1	2	3	4	5	6	7
Lots to see and do	0	1	2	3	4	5	6	7
A place that is not too “touristy”	0	1	2	3	4	5	6	7
Good ocean beaches	0	1	2	3	4	5	6	7
Natural scenic beauty	0	1	2	3	4	5	6	7
Places for swimming or boating	0	1	2	3	4	5	6	7
Fishing	0	1	2	3	4	5	6	7
Close to other holiday destinations	0	1	2	3	4	5	6	7
Places for walking/tramping	0	1	2	3	4	5	6	7
Snow sports	0	1	2	3	4	5	6	7
Friendly locals	0	1	2	3	4	5	6	7
Shopping	0	1	2	3	4	5	6	7
Adventure activities	0	1	2	3	4	5	6	7
Hot pool bathing	0	1	2	3	4	5	6	7
Good cafes/restaurants	0	1	2	3	4	5	6	7
Suitable accommodation	0	1	2	3	4	5	6	7
Maori culture experiences	0	1	2	3	4	5	6	7
Good value for money	0	1	2	3	4	5	6	7
Wineries	0	1	2	3	4	5	6	7

**Thank you for completing Section A. Please now refer to Section B.**

## **A Study of Short Break Holiday Preferences**

# **SECTION B**

- ✓ **Please do not read Section B until you have completed Section A.**
- ✓ **In this section we are interested in how you rate five short break holiday destinations.**
- ✓ **It does not matter if you have never visited a particular destination, as we are interested in how you imagine it to be.**

**Thank you for your help.**









28. We are now interested in the extent to which you agree **Taupo** provides each destination feature. Your thoughts are valuable to us even if you have not visited this destination.

Please circle one number for each statement. For example, if you felt very strongly that Taupo is “a comfortable drive from home”, you would circle 7.

0 No opinion	1 Very strongly disagree	2	3	4	5	6	7 Very strongly agree
-----------------	-----------------------------	---	---	---	---	---	--------------------------

**To what extent do you agree Taupo...**

	0	1	2	3	4	5	6	7
is a comfortable drive from home								
has good weather								
has lots to see and do								
is not too “touristy”								
has good ocean beaches								
has natural scenic beauty								
is good for swimming or boating								
has good fishing								
is close to other holiday destinations								
has places for walking/tramping								
offers snow sports								
has friendly locals								
has good shopping								
has a range of adventure activities								
has hot pool bathing								
has good cafes/restaurants								
has suitable accommodation								
offers Maori culture experiences								
is good value for money								
has wineries								

29. Please circle one number to indicate how you feel **Taupo** rates:

Sleepy								Arousing
	1	2	3	4	5	6	7	

30. Please circle one number to indicate how you feel **Taupo** rates:

Unpleasant								Pleasant
	1	2	3	4	5	6	7	

31. Have you ever visited **Taupo**? Yes  No

32. What is the likelihood of you visiting **Taupo** within the next 12 months?

Definitely not	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Definitely
----------------	---------------	----------	-----------------------------	--------	-------------	------------

33. What is your age group? (Please tick the appropriate box)
- 18-25       26-34       35-49       50-64       65+
34. What is your gender?    Male                   Female
35. In what part of Auckland do you reside?
- 
36. What is your **household** income bracket?
- Under \$38,000       \$38,000 - \$49,000       \$49,001 - \$65,000
- \$65,001 - \$80,000       \$80,001 - \$100,000       Over \$100,000
37. Which of the following best describes your present marital status?
- Single
- Gay single
- Married/Permanent heterosexual partner
- Permanent same sex partner
- Separated/Divorced/Widowed
38. How many **dependent** children do you have at home?
- None                   1-2                   3 or more
39. Which one of the following best describes your highest **completed** education?
- High School                   Polytechnic                   University graduate
- Professional Qualifications (e.g. Accountancy)       University Post-Graduate
40. Were you born in New Zealand?
- Yes
- No
- If no, how many years have you lived in New Zealand? \_\_\_\_\_

Is there anything else you would like to tell us about how New Zealand holiday destinations could develop, to better cater to your needs? If so, please use this space for that purpose.

Many thanks for taking the time to complete this survey. Your contribution is greatly appreciated.

**Please don't forget to enter the draw for two nights hotel accommodation. Simply fill in your details on the entry form and return it, along with your completed questionnaire, in the Freepost envelope supplied.**

## Appendix D - Destination Performance Ranking

Attribute	Importance	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	5 <sup>th</sup>
Suitable accommodation	5.99	ROT 5.99	TPO 5.70	BOI 5.69	MT 5.42	COR 5.11
Good value for money	5.99	ROT 5.03	COR 4.94	TPO 4.74	BOI 4.63	MT 4.56
Within a comfortable drive	5.50	COR 5.69	ROT 5.56	MT 5.41	BOI 5.02	TPO 4.96
Natural scenic beauty	5.37	COR 6.27	BOI 6.05	TPO 5.75	ROT 5.73	MT 5.16
Good cafes/restaurants	5.20	ROT 5.47	TPO 5.35	MT 5.06	BOI 4.81	COR 4.34
Good weather	5.07	MT 5.49	BOI 5.41	COR 5.13	TPO 4.46	ROT 4.45
Lots to see & do	4.85	ROT 6.08	BOI 5.55	COR 5.18	TPO 5.09	MT 4.86
Ocean beaches	4.50	COR 6.09	MT 6.00	BOI 5.07	TPO 1.89	ROT 1.63
Friendly locals	4.46	COR 4.76	TPO 4.59	BOI 4.46	ROT 4.34	MT 4.27
Swimming or boating	4.34	COR 6.12	BOI 5.98	MT 5.80	TPO 5.46	ROT 4.43
Not too touristy	4.34	COR 5.11	BOI 3.87	MT 3.85	TPO 3.81	ROT 2.96
Hot pool bathing	4.15	ROT 6.54	TPO 5.44	MT 4.14	COR 3.82	BOI 2.89
Places for walking/tramping	4.11	COR 6.00	ROT 5.64	TPO 5.59	BOI 5.16	MT 4.66
Shopping	3.82	MT 4.67	ROT 4.62	TPO 4.67	BOI 3.75	COR 3.49
Wineries	3.79	MT 3.43	COR 3.09	BOI 3.00	TPO 2.60	ROT 2.57
Adventure activities	3.56	ROT 5.73	TPO 5.48	BOI 4.84	COR 4.71	MT 4.42
Fishing	3.23	COR 5.91	BOI 5.90	TPO 5.73	MT 5.28	ROT 4.71
Close to other destinations	3.02	ROT 5.44	TPO 5.40	MT 5.29	BOI 4.90	COR 4.84
Snow sports	2.74	TPO 4.68	ROT 1.86	MT 1.51	COR 1.30	BOI 1.29
Maori culture experiences	2.41	ROT 6.37	BOI 4.30	TPO 3.92	MT 2.77	COR 2.65

## Appendix E – Rotorua ToMA Group

	Rotorua ToMA n	Rotorua ToMA %	Total Sample N	% of Category
<b>Age</b>	N = 180		N = 746	24.1%
18-25	9	5.0%	24	37.5%
26-34	22	12.2%	116	19.0%
35-49	88	48.9%	291	30.2%
50-64	43	23.9%	227	18.9%
65+	18	10.0%	88	20.5%
<b>Gender</b>	N = 180		N = 746	
Male	78	43.3%	338	23.1%
Female	102	56.7%	408	25.0%
<b>Harbour Bridge</b>	N = 180		N = 763	
North	44	24.4%	242	18.2%
South	136	75.6%	521	26.1%
<b>Reside</b>	N = 180		N = 717	
Takapuna	12	6.7%	58	20.7%
East Coast Bays	5	2.8%	15	11.4%
Massey	15	8.3%	50	30.0%
New Lynn	24	13.3%	67	35.8%
Glenfield	13	7.2%	61	21.3%
Western Bays	8	4.4%	42	19.1%
Mt Roskill	20	11.1%	69	29.0%
Hobson	25	13.9%	98	25.5%
Maungakiekie	6	3.3%	38	15.5%
Pakuranga	23	12.8%	77	29.9%
Papatoetoe	9	5.0%	40	22.5%
Paheurehure	12	6.7%	33	36.4%
<b>Income</b>	N = 166		N = 697	
<\$38,000	34	20.5%	154	22.1%
\$38,000-\$49,000	25	15.1%	118	21.2%
\$49,001-65,000	29	17.5%	118	16.1%
\$65,001-\$80,000	17	10.2%	76	22.4%
\$80,001-\$100,000	28	16.9%	103	27.2%
>\$100,000	33	19.9%	129	25.6%
<b>Marital</b>	N = 179		N = 740	
Single	22	12.3%	80	27.5%
Gay single	1	0.6%	5	20.0%
Permanent partner	127	71.0%	551	23.1%
Same sex partner	7	3.9%	21	33.3%
Separated	22	12.3%	83	26.5%
<b>Children</b>	N = 180		N = 744	
0	87	48.3%	415	21.0%
1-2	67	37.2%	253	26.5%
3+	26	14.4%	76	34.2%
<b>Education</b>	N = 179		N = 742	
High School	66	36.9%	269	24.5%
Polytechnic	43	24.0%	155	27.7%
University	26	14.5%	104	25.0%
Professional	34	19.0%	150	22.7%
Post-graduate	10	5.6%	64	15.6%
<b>Born</b>	N = 180		N = 745	
Born in NZ	144	80.0%	561	25.7%
Born overseas	36	20.0%	184	19.6%

## Appendix F – An Evaluation

In the process of the viva it was suggested by the examiners that a PhD is not only about researching a specific topic, but also a process of learning and evaluation of the research process itself. As a previous General Manager of an RTO, I was asked about my reactions to this statement, and what, in effect, had I learnt. Since my answer touched upon issues relating to the purpose of an RTO, my examiners suggested that my reflections might prove a useful appendix to the thesis, particularly to the issue of normative versus positive concepts of sustainable management. Thus, was this particular candidate hoisted by his own petard!

In January 1996, after 17 years in the tourism industry, I became an apprentice academic. It would be fair to state that my thinking has matured since, particularly during the course of the thesis. In my role as founding General Manager of Tourism Rotorua I was clearly employed as a 'booster', a term used to describe "...a simplistic attitude that tourism development is inherently good and of automatic benefit to the hosts" (Hall, 1998, 248). Getz (1987, in Hall 1998) argued 'boosterism' is practised by two groups; politicians seeking economic development and those benefiting financially from tourism. In 'boosterism' little planning consideration is given to the wider issues of potential negative economic, social and environment impacts. In 1988, the decision by the RDC to establish and finance an RTO was based on the recognition that tourism is labour intensive. Since Rotorua's unemployment level was the second highest in New Zealand, the rates-based investment in tourism was considered to offer more employment creation prospects than the other two major local industries, farming and forestry. While this initiative appeased the local tourism lobby, the wider rates-generating population, which includes the farmers and foresters, have not always been supportive. Their lack of support was on the basis that one industry, tourism, was receiving preferential treatment through local authority 'subsidies', while their own was not. Indeed, as noted by Hall (1998, p. 248), those who challenge such development may be regarded by the boosters as "unpatriotic or excessively

negative". In my defence, however, I would argue that Rotorua's tourism industry and therefore the local economy was in crisis. The short-term need was enhanced promotion to generate increased visitors, spending and therefore jobs for our local youth. A just cause? This perspective needs to be located in the context of the market-led, user-pays rhetoric of 'Rogernomics', then the accepted economic doctrine of that time. It is interesting to observe how, today, in response to the Local Government Bill, Rotorua District Council is now embracing tourism within economic and community planning, and justifies its buy out of the private sector partner in the Rotorua Airport on the same grounds of investing in a public asset.

I would also argue that while terms such as 'sustainable planning' and 'market orientation' are now used more often in New Zealand tourism industry communications, the focus is still generally a promotion orientation. If this seem contrary to the previous statement, it is worth noting that, at least in New Zealand, environmental initiatives such as Green Globe 21, are being sold to industry on the basis of an ability to increase profit by cutting costs and attracting more business. To what extent 'more business' is eventually sustainable is a question noted by its absence. This is understandable. After all, who ultimately are most RTOs accountable to - tourism businesses or local residents and conservationists? I might also argue that sustainable tourism needs a financially viable tourism industry and community. In many parts of the world, blighted areas of land remain a silent testament to economically unsustainable activities – with all the associated human loss and community movement that has created. One has only to take the examples of, in the UK, the Swansea Valley, or of Bradford, with their past crumbling remains of the industrial revolution and the challenges they were to present almost seventy years later as the economies of these towns sought to change to meet the needs of the new millennium. Consequently, there may be a balance between economic development and environmental protection; and the two may not be inimical. Afterall, as noted by Sharpley and Sharpley (1997) there can be no sustainable tourism without the consumer. Therefore the normative aspects of 'sustainable tourism' need a positive, that is a research-based approach based on some concepts of observable truths, if the ethics of conservation are to be translated into practical and measurable actions. Again,

tensions within the New Zealand industry can be observed. For example, at Lincoln University, the original request for funding and support for the work completed by Dr Becken on pollution emissions from tourism, that was to become the core of the response made by the New Zealand Tourism Industry Association, was initially rejected by them as being of no strategic importance. It was the intervention by the Minister of Tourism that helped gain funding for the project (Simmons, 2002, personal communication).

On a more personal note, certainly since the period 1989 -1996, my thinking has evolved and matured. I now have a more holistic view of tourism, and am concerned with issues other than 'getting more bums on seats'. While I remain a marketer, I am more in line with the societal marketing philosophy, which, while espousing a market orientation, also requires satisfaction to be delivered in a way that does not impair the well-being of consumers or society (Kotler, Bowen and Makens, 1999). Hence my view in Chapter 2 that the mission for any DMO should clearly be to stimulate *sustainable* tourism development. My view of the potential of the role of positioning in this mission is unchanged – the process is mutually beneficial for both the demand and supply sides of the tourism market. The process should not require any salesmen 'as slick as cat poo on a lino floor', a term introduced to me by a Rotorua fat cat, circa 1989. An example of this is indicated in Tourism Rotorua's Sustainable Tourism Charter. One reason for its being is the argument that if the branding is *Manaakitangi*, then the brand must have integrity. The charter helps sustain that integrity by providing practical evidence of the holistic understanding of hospitality. In my view however, the spirit of *Manaakitanga* should be the guiding vision for the community, but not the promotional theme for the domestic market.

My own experience directly relates to the great divide between academia and industry. While the wealth of academic literature provides a rich resource for practical marketing planning, the reality is that RTOs have a busy operational focus. How many practitioners have time to keep up to date with the literature? Tourism Rotorua, and the other 24 New Zealand RTOs, faced a number of challenges during the period of the thesis, including:

- Rebuilding the Japan, North American and European markets following the September 2001 terrorist strikes.
- Rebuilding the markets of 1997 post-crash North Asia.
- Developing the emerging potential giants of China and India.
- Investing in the potentially lucrative, but politically troubled, markets of South America and South Africa.
- Competing in the limited domestic market.
- Competing for events, exhibitions and conferences.
- Developing the fledgling inbound incentive market.
- Developing internet and electronic marketing capabilities.

However, these are merely the promotional challenges in a much broader portfolio of responsibilities. This is evident in the range of other destination management responsibilities in Tourism Rotorua's strategic plan, which was discussed in Chapter 3. For such busy practitioners, the expanse and variety of the tourism literature can be overwhelming. The range of topics and depth of intellectual discourse can be too great to comprehend. The difficulty lies in the complex, multidisciplinary and fragmented nature of the tourism system. Equally, however, promotional planning devoid of any illumination provided by research may be mistaken and potentially threaten the desired economic ends.

It has been suggested more research needs to provide practical recommendations for tourism practitioners (Baker, Hozier and Rogers 1994, Nickerson and Moisey 1999, Selby and Morgan 1996, Taylor, Rogers and Stanton 1994). In New Zealand, Coventry (1998) cited a Destination Queenstown spokesperson who was particularly critical of Kearsley, Coughlan and Ritchie's (1998) destination image report:

*Why don't academics produce meaningful research which adds value to debate...they just produce this academic, trite stuff which simply occupies shelves and gives academics something to do.*

From an academic's perspective this type of comment may be surprising given the richness of tourism marketing information in the extant literature. For example, Ritchie (1996, pp. 51-52) argued that tourism research "from its very beginning, has been driven by individuals having a strong marketing orientation". Nevertheless, this was a perception held by a tourism leader, and unfortunately 'perception is reality'. In this regard, Riley and Palmer (1975) lamented their study recommendations had not been adopted by industry. They suggested market research must therefore be marketed to industry. In discussing the gap between researchers and practitioners Taylor, Rogers and Stanton (1994) suggested the key to research not ending up collecting dust on a shelf, as was much of what was produced by Canada's tourism researchers, lay in improving interpretation and presentation. Similarly, Australia has yet to develop close ties between tourism industry and academia (Hall, 1998).

As a new academic I have been impressed with the wealth of valuable information that exists in the literature, and I wished someone had shared it with me during my time in industry. The problem as I see it from a practitioner's perspective, in general, is that they are far too busy organising tomorrow's cash flow to have the luxury of immersing in a literature that is spread out across so many journals, in the form of relatively long papers, using words that may appear quite foreign. Practitioners have suggested to me, that if this literature really does contain the good oil, then it should be summarised into one-page reports, and bullet pointed with lots of white space. But what is the incentive for academics to undertake this? As an emerging academic I understand that to gain recognition from my new peers I must keep getting published in the literature. We must publish or perish, and yet even though my work has practical implications, I am left wondering how many practitioners will actually read them.

While academics may need to better market their work to industry, is it a one sided problem? Certainly, the New Zealand tourism industry could be more proactive. The value of research was recognised with the formation of the new Tourism Research Council. Why then was only one academic appointed? Why, when the New Zealand Tourism Strategy was released, was the word 'academics'

not included in the list of stakeholders? When will a tourism academic be appointed to the board of Tourism New Zealand? My own dealings with Professors Chris Ryan of The University of Waikato and Michael Hall of The University of Otago have convinced me that industry is the poorer for not better utilising their vast knowledge and interest in practical, read 'real world' research.

As I have stated in the thesis, I have attempted to bridge the gap by engaging five RTOs in the research. Does industry lead academia or does academia inform industry? Clearly, the relationship should be symbiotic – both camps have much to gain, but like the 'two circuits' of visitation in Rotorua, the overlap of engagement may be minimal. More debate on the issue is required, perhaps at industry conferences. For example, I believe the New Zealand tourism industry could learn from the format of academic conferences. The annual tourism industry conference, organised by the Tourism Industry Association of New Zealand, has become an event where a succession of 'talking heads' are presented to delegates, with little if any opportunity to engage in any debate about issues raised. Certainly, the conference has networking value. However, recent criticism by delegates, in *Nigel Coventry's Inside Tourism*, suggests that a change in format is required if the conference is to become more effective as a change agent.

However, if this seems a message without hope, there is a positive side. One can observe in the industry a growing professionalism, and, albeit perhaps a little slowly, a growing understanding of the role that research has to play. One sign of growth is that as even small businesses grow, there emerges a need to recruit people from outside of the entrepreneur's family or immediate circle of friends. Simultaneously there are more graduates from tourism degrees and other courses, and so there is reciprocity of need. As those graduates develop their careers within the industry, past training begins to inform the desire for data, information and research as necessities for decision taking. My PhD supervisor once said to me that being a tourism academic was a little like being dripping water – over time, although slowly, the agendas of the industry begin to take on the concerns of past academic research – the stone of the industry does begin to bear the grooves and marks of the dripping research! In New Zealand, the new

initiatives of the Ministry of Tourism in making the outcomes of past research more easily available to industry through web sites is further evidence that, perhaps, not all is yet lost. There may yet still be boosterism – but it may be a community-industry-visitor-environment complex that will be ‘boostered’ instead of simple indices like numbers of visitors. Consequently the research processes required will be complex, and a better understanding of research design, implementation and interpretation will continue to be needed. The academic thus still has a role, and communications through teaching, academic publication, playing a role with industry (as many academics do through membership of local tourism organisations) and acting as information resources may have further the process of professionalism that has been noted.