CHAPTER 10

Destination branding

One industry after another has discovered that brand awareness, perceived quality, customer loyalty, and strong brand associations and personality are necessary to compete in the marketplace.

Aaker & Joachimsthaler (2000, p. ix)

Aims

The aims of this chapter are to enhance understanding of:

- the role and importance of destination brands
- brand identity
- consumer-based brand equity.

Perspective

Today's consumers have more product choice but less decision time than ever before. Consequently, a brand that can help simplify decisions, reduce purchase risk, create and deliver expectations is invaluable. The topic of product branding first appeared in the literature 50 years ago, but while research published in the time since provides a valuable resource for consumer goods marketers, work related to the branding of tourism destinations has been relatively sparse. This is a significant gap in the tourism and travel research fields, particularly given that a number of leading brand authors have cited the prediction that the future of marketing will be a 'battle of brands, a competition for brand dominance' (see Aaker, 1991 p. ix; de Chernatony 1993, p. 173), and that within the tourism industry destinations are emerging as the biggest brands (Morgan et al., 2002, 2004). However, it is likely that many destinations will become increasingly substitutable, if not already so, and therefore are commodities rather than brands. This chapter explores the reasons behind these assertions, with the discussion underpinned by four themes. First, the understanding that promoting product features is not sufficient to differentiate against competitors is fundamental to brand theory. Second, the already complex process of product brand development and management is intensified for destination marketers, who exert no control over the actual delivery of the brand promise. Third, and following the previous point, there has been little published research to date to guide DMOs on the long-term effectiveness of destination branding. Fourth, the view has been adopted that branding is at the very heart of marketing strategy, and so the purpose of all destination marketing activity must be to enhance the value of the brand.

The importance of brands

The first branding papers appeared in the literature during the 1950s (see, for example, Banks, 1950; Gardner & Levy, 1955). Gardner and Levy discussed stereotypes that had emerged in advertising which failed to differentiate competitive products. They espoused the importance of considering a brand as representing a personality (p. 35):

> *… a brand name is more than the label employed to differentiate among the manufacturers of a product. It is a complex symbol that represents a variety of ideas and attributes. It tells the consumers many things, not only by the way it sounds (and its literal meaning if it has one) but, more important, via the body of associations it has built up and acquired as a public object over a period of time … The net result is a public image, a character or personality that may be more important for the overall status (and sales) of the brand than many technical facts about the product.*

There is evidence to suggest branding practice was around centuries before it became an academic field. Keller (2003) cited reports about identification marks of craftsmen being found on pottery in China, Europe, and India dating as far back as 1300 BC. The evolution of brand development since the 1870s was examined by King (1970), who suggested the driving force was the cyclical balance of power in the manufacturer–distributor relationship. Branding of manufactured goods emerged during the late 19th century to counter the dominating force of wholesalers who controlled what were essentially commodity markets. Retailers purchased what was available in stock from wholesalers, who in turn dictated what manufacturers should produce. From the 1900s to the 1960s the role of the wholesaler was reduced to that of distributor, as manufacturer numbers declined to the level of oligopolies. Brands were then used to build demand for a smaller line of goods, with economies of scale leading to increased profits for manufacturers. This occurred at the expense of retailers' margins, since manufacturers controlled consumer prices. By 1970, the balance of power had shifted towards large-scale retailers, where economies of scale and their own brand labels enhanced profit levels (pp. 7–8):

> *After all, many retail chains are bigger businesses than most consumer goods manufacturers; and on the whole there are more manufacturers still in most fields than the retailer really needs.*

The new role for product marketers was to improve the value of their brands to the consumer as well as to the mega-retailer. King also used the term brand personality to suggest that brands held values beyond their physical and functional attributes (p. 11):

> *People choose their brands as they choose their friends. You choose your friends not usually because of specific skills or physical attributes (though of course these come into it) but simply because you like them as people. It is the total person you choose, not a compendium of virtues and vices.*

Following Aaker (1991, p. x), de Chernatony (1993, p. 173), and Keller (2003, pp. 39–41), there are a number of compelling reasons why branding is generating increasing awareness of the importance of brands among product and service providers: brand equity, increasing global competition, commodification, the power of retailers, sophisticated consumers, brand extensions, media cost-effectiveness, and a short-term performance orientation.

Brand equity

One of the most important impacts of branding for commercial organisations has been the increasing awareness of the balance sheet value of brands, referred to as brand equity. That is, a brand can be an asset or a liability to the firm, and as such can affect the valuation of the firm. Given the difficulty in developing new brands, there is a willingness by firms to pay a premium for the purchase of well-known brands.

Under the International Accounting Standards, the value of a brand cannot be brought to the balance sheet unless they have been acquired for financial consideration (James, 2007). This is due to the lack of an agreed framework or method for calculating brand equity. For this reason the Standards Association of Germany has launched an international working party to develop an ISO standard for brand valuation. It is expected the project will take several years.

Of the different methods available to measure intangible brand equity, *Business Week* (August, 2003) selected that used by brand consultancy Interbrand (www.interbrand.com) to calculate the value of the world's 100 top brands. Interbrand valued brand equity based on the net present value of future earning potential. The top ten brand values are shown in Table 10.1, where it can be seen that the intangible Coca-Cola brand was valued at US$70 billion. The tourism related Disney brand was ranked seventh, at US$28 billion.

The marketing budget should be regarded as an investment in consumers' associations of the brand (Keller, 2000). There is a growing view that branding lies at the core of marketing strategy, and that the purpose of the marketing programme should be to focus on developing favourable brand associations, linking the brand's attributes to consumer needs. The other motive for measuring brand equity, other than financial asset valuation, is marketing effectiveness. It is the latter, consumer-based brand equity (CBBE) which may be the most critical for organisations, since financial valuation is irrelevant if no underlying consumer-based value of the brand has been established (Keller, 1993). For destinations the concept of consumer-based destination brand equity is clearly more relevant than balance sheet values.

Table 10.1 The world's top 10 brands in 2003

Rank	2003 brand value US$ billions
1. Coca-cola	70.45
2. Microsoft	65.17
3. IBM	51.77
4. GE	42.34
5. Intel	31.11
6. Nokia	29.44
7. Disney	28.04
8. McDonald's	24.70
9. Marlboro	22.18
10. Mercedes	21.37

Source: Adapted from *Business Week*, August 2003: viewed 22/10/03 at: www.interbrand.ca/pdf/Best_Global_Brands.2003.pdf.

Increasing global competition

Competition is intensifying through the breaking down of trading barriers between nations. This and other impacts of globalisation, such as the internet, has led to a greater awareness of global competitors by both producers and consumers. Since 70% of international travellers visit only 10 countries, over 90 NTOs compete for 30% of total international arrivals (Morgan et al., 2002). The new competition phenomenon does not discriminate against famous destinations. For example, Dahles (1998, p. 56) claimed that while once competing with London and Paris to be Europe's most popular destination, Amsterdam was 'fighting for survival'. Increasing competition between traditional and emerging destinations has significant consequences for most places (Middleton, 1998, p. 153):

> *The great majority will need to review and adapt their traditional organisational and marketing methods to survive and prosper in the next millennium. One can only speculate that some will be unable to make the change and will not survive as holiday destinations beyond the next decade or so.*

Commodification

Commodification of products is increasing, due to the difficulty of differentiating like-products in crowded markets. As the craftsmen of a century ago would have been only too aware, product features can be quickly imitated and so do not provide a lasting source of advantage. The effect of continued commodification in markets is ultimately competition based on price (Aaker & Joachimsthaler, 2000, p. 40):

> *Too many brands drift aimlessly and appear to stand for nothing in particular. They always seem to be shouting price, on sale, attached to some deal, or engaging in promiscuous channel expansion – symptoms of a lack of integrity.*

An effective brand strategy can provide a means for successful differentiation. After all, in commodity categories 'something' must make a greater difference to a consumer's thinking about the competing products that offer features of a similar quality, and that something is the symbol a brand represents to the consumer (Gardner & Levy, 1955). Keller (2003) pointed to successful branding within a number of commodity categories, where product differentiation is difficult to achieve, such as water (Perrier), beer (Budweiser), cigarettes (Marlboro), soap (Ivory), pineapples (Dole), oatmeal (Quaker), and bananas (Chiquita).

The power of retailers

The power of mega retailers is increasing. Development of their own labels, access to customers, combined with their control of high-profile shelf space can be a significant barrier for small product suppliers. This power of retailers not only applies to fast-moving consumer goods in supermarkets, but equally to the distribution of tourism services through retail travel, both traditional and online.

Sophisticated consumers

Today's consumers are the most sophisticated ever to be faced by marketers. We are experienced, having been exposed to unprecedented levels of media communications, and have access to increasing sources of product information and consumer advice. In so many cases we are spoilt for choice, and we know it.

Brand extensions

Many major brands have capitalised on brand equity by extending their range of offerings across categories and segments. For example, what is a Ford, or a Cadbury or a Nike? Both managing and competing against an extensive brand portfolio hierarchy are now major challenges.

Media cost-effectiveness

Marketers are now faced with escalating media costs, often in tandem with declining advertising budgets. Also, the proliferation of new and niche media is resulting in a relative decline in the effectiveness of traditional advertising. This has led to increased interest in below-the-line promotional opportunities.

Short-term performance orientation

Marketing planning has long been driven by short-term measures of accountability. Such pressures, which may be exerted by shareholders, management and/or economic analysts, place emphasis on tactical initiatives for short-term gain rather than longer-term strategies.

Branding destinations

> *… we have 'somehow' failed to recognize the significance of the branding function in our efforts to increase awareness of destinations and to create the positive attitudes that are so essential to the final choice of a travel destination* (Ritchie & Ritchie, 1998, p. 89).

What exactly is a destination brand? Are they 'collective hallucinations' as suggested by Professor John Urry in the keynote address to the 2003 *Taking Tourism to the Limits* conference at the University of Waikato? When considering definitions of the brand construct, it is important to consider the perspectives of both the organisation and the market. From the market perspective the commonly cited definition provided by Aaker (1991, p. 7) is pertinent to the ensuing discussion on the branding of destinations, which effectively represent 'groups of sellers':

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

A brand must stand for something, a promise to the consumer, and so is much more than merely symbols presented to the public. It is useful to consider a brand as representing an identity for the producer and an image for the consumer. Aaker (1996) distinguished these separate components of a brand as the brand identity (internal organisation orientation), representing self-image and aspired market image, and the brand image (external market orientation) of the actual image held by consumers. The model in Figure 10.1 highlights these two distinctive components, along with a third overlapping element, which is brand positioning. It is proposed brand positioning that is the interface between brand identity and brand image, over which the DMO has some control. This chapter focuses on the development of a destination brand identity. The components of destination brand image are outlined in Chapter 11, and destination positioning is the focus of Chapter 12.

There is a lack of published research relating to tourism destination branding. This is in spite of general agreement in academia and industry that the concept of branding can be applied to destinations. In fact the topic of destination branding did not appear in the tourism literature until the late 1990s, with the first journal article by Pritchard and Morgan (1998). Gnoth (1998, pp. 758–760) suggested the special track on 'Branding Tourism Destinations' he convened at the 1997 American Marketing Science Conference, represented the first meeting of practitioners and academics on the topic.

Within a decade the first destination branding conference was staged. The initiative of Macau's Instituto De Formacao Turistica (IFT), in conjunction with Perdue University, to convene this first conference on destination

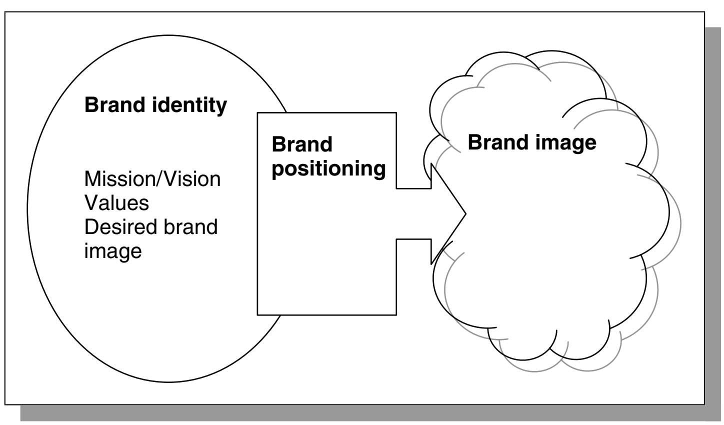

Figure 10.1
Brand identity, brand positioning and brand image

branding, was thus new territory and a test of academic interest in the topic. Ultimately, the decision was justified with around 100 delegates from 22 countries. It is hoped the conference will be staged every two years. At the time of writing the second conference was scheduled for December 2007 (see http://www.ift.edu.mo/conference/).

In the decade since Morgan and Pritchard's (1998) article, there have been relatively few published case studies applying theory to destination branding, particularly at the RTO level. However, this should be tempered by the understanding that in the general marketing and strategy literature and practice, branding has also received much less attention than the product and its functional attributes (Urde, 1999). The application of brand theory to practice is a complex and challenging process, magnified for destinations by the constraints faced by most DMOs, as discussed in Research Snapshot 10.1.

Research snapshot 10.1 Destination branding complexity

Little has been reported in the tourism literature regarding the complexity of destination branding. This paper summarised six issues that make the application of branding theory to destination a complex undertaking:

1. Destinations are far more multidimensional than consumer goods and other types of services. To be effective, positioning theory suggests reaching the minds of busy consumers requires a succinct message focusing on one or a few brand associations. Nowhere is this challenge better highlighted than in the development of a seven word slogan that encapsulates a destination's diverse and often eclectic range of natural resources, built attractions, culture, activities, amenities, and accommodation.
2. The market interests of the diverse group of active stakeholders are heterogenous. Counter to a market orientation, where products are designed to suit market needs, DMOs are forced into targeting a multiplicity of geographic markets to attract a wide range of segments for their range of products, most of which are rigid in what they can be used for. Is one slogan, such as *Idaho – great potatoes*, *tasty destinations*, or *Slovenia – the grown place of Europe*, likely to be meaningful to all market segments?
3. The politics of decision-making can render the best of theory irrelevant. The issues of who decides the brand theme, and how they are held accountable, are critical. At the level of DMO governance and decision-making, politics arises through inequality between tourism organisations. For example, Ritchie and Ritchie (1998) referred to the heavy influence of the Disney Corporation on the *Orlando Magic* destination brand.
4. There is a fine balance to be struck between community consensus and brand theory, since a top-down approach to destination brand implementation is likely to fail. Critically, DMOs lack any direct control over the actual delivery of the brand promise by the local tourism community. Without buy-in from these stakeholders the strategy will likely flail.
5. Brand loyalty, one of the cornerstones of consumer-based brand equity models, can be operationalised to some extent by measuring repeat visitation through a DMO's visitor monitor programme. Staying in touch with previous visitors is a powerful but untapped means of enhancing the destination brand, but DMOs have no access to the hundreds of thousands of visitors' contact details left at accommodation registration desks.

6. Funding is often a continuous problem for DMOs, in both scale and consistency. Even the largest DMO budgets pale in comparison to those of the major corporate brands, with which they compete for discretionary consumer spend. Since DMOs have no direct financial stake in visitor expenditure, they must continually lobby for public and private funding. A successful brand campaign leading to increased yields for local businesses does not often translate into increased revenue for the DMO.

Source: Pike, S. (2005). Tourism destination branding complexity. *Journal of Product and Brand Management*, *14*(4), 258–259.

Consumer-based brand equity

A worthwhile starting point in considering how brand theory might apply to destinations is to consider consumer-based brand equity (CBBE) models (see Aaker, 1991; Keller, 2003). CBBE comprises the following assets: brand awareness, brand associations, brand resonance, and brand loyalty.

Brand awareness

Brand awareness is the foundation of all sales activity. Consider for example the hierarchical AIDA advertising axiom, based on the hierarchy of needs proposed by Lavidge and Steiner (1961), which aims to attract attention, stimulate interest, create desire, and ultimately result in consumer action. Awareness represents the strength of the brand's presence in the mind of the target, with the goal not being to achieve general awareness, but to be remembered for the reasons intended (Aaker, 1996).

Brand associations

The aim should be to increase familiarity with the brand through repeated exposure and strong associations with the product category (Keller, 2003). Brand associations held in the mind about a product aid consumer information processing: 'A brand association is anything "linked" in memory to a brand' (Aaker, 1991, p. 109). What is most critical is that brand associations are strong, favourable, and unique, in that order (Keller, 2003).

Brand resonance

Brand resonance represents a willingness to engage with the destination. This can be viewed in terms of behaviour, such as previous visitation, or attitudinally, such as stated intent to visit in the future.

Brand loyalty

In any CBBE model, the pinnacle is brand loyalty, which is ultimately measured by repeat and referral custom. Given the increasing substitutability of destinations, the key advantages of brand loyalty for destinations include lower marketing costs, increased travel trade leverage, and word-of-mouth referrals. While a number of studies in other fields have identified correlations between customer retention and increased profits (see Aaker, 1996, p. 22), there is a dearth of literature relating to destination loyalty and switching costs (Grabler, 1997a). In an early study of repeat visitation, Gitelson and Crompton (1984) found five factors that contributed to a return to a familiar destination:

- reduced risk of an unsatisfactory experience
- knowledge that they would find their own kind of people there
- emotional or childhood attachment to experience
- opportunities to visit aspects of the destination not previously experienced
- to expose others to a previously satisfying experience.

Critical success factors

In moving towards a structure for destination brand strategy it is useful to consider potential critical success factors. In this regard Keller (2000) identified ten characteristics of the world's strongest brands, which could be used by marketers to identify strengths and weaknesses of a brand and its competitors. Unfortunately no destination brands were included in the analysis. However, Keller's brand report card does warrant consideration by destination marketers, albeit with a caveat that the level of control or influence able to be exerted by DMOs makes implementation problematic:

- **The brand excels at delivering the benefits customers truly desire.** Two implications of this for DMOs are effective marketing research and stimulating the consistency of service delivery in a myriad of service encounters over which the DMO has no control.
- **The brand stays relevant to customers.** This is a key challenge for all destinations, which evolve over time through a lifecycle. As well as staying in tune with changing consumer and travel trends, two other aspects of this are important. The first is the necessary (re)investment in product improvements to maintain and enhance the destination experience. The second is the influence of the development of new attractions and facilities by entrepreneurs, which may or may not fit the original character of the destination brand. For example, SnowWorld at Australia's Surfer's Paradise always seemed incongruent with the image of a subtropical beach resort, and yet did fit the Gold Coast's former *Coast with the most* brand theme that implied the benefit of lots to see and do.
- **The pricing strategy is based on consumers' perceptions of value.** While DMOs usually have no control over product pricing, it is possible for the DMO to institute measures to monitor perceptions of value

held by customers and non-customers in target markets. Clearly this is an important issue for DMOs, given the importance placed on value for money as an important destination attribute by travellers (see for example Baloglu & Mangaloglu, 2001).

- **The brand is properly positioned in the market by offering a distinctive value proposition.** This is challenging for DMOs given the multi-attributed nature of a destination, and the sheer number of competing places with similar offerings crowding the market place.
- **The brand is consistent.** DMOs should ensure that the delivery of all communications consistently reflects the brand's values. Politics can be a problem for destinations in this regard. For example, in the case of Valencia in Spain the public-funded DMO is required to issue new advertising contracts every year (Pritchard & Morgan, 1998, 2002). In the state of Louisiana, the Department of Culture, Recreation and Tourism is legislated to review its advertising agency account every three years (Slater, 2002). Prior to establishing a PPP-based Florida STO in 1996, any change in the politician responsible for the tourism portfolio resulted in a change of marketing strategy and slogan (see Bush, 2004). At another level is the politics of intermediaries such as airlines, travel agents and wholesalers. Vial (1997, in Morgan & Pritchard, 1998) cited the example of the *Feast for the senses* brand developed by Publicis for the Morocco Tourist Board. This was an attempt to develop an umbrella brand for use in all markets. Previously, different campaigns had been used in different markets, which had resulted in a confused image. The proposed campaign did gain the support of the tourism industry in Morocco. However, it was derailed by resistance from travel agents and tour wholesalers who viewed the campaign as promoting cultural tourism when they were in the business of catering to the need for sun and sea packages.
- **The brand portfolio and hierarchy make sense.** Hopper (2002) reported how the plethora of brands used by tourism businesses to promote London had led to a dilution of the brand designed by the London Tourist Board. In tourism there may be up to six or more levels in the destination brand family tree, as shown in Table 10.2, ranging from the country brand to local tourism businesses. The issue becomes complex

Table 10.2 Destination brand family tree

Level	Entity
1	Country brand
2	Country tourism brand
3	State tourism brands
4	Regional/macro regional brands
5	Local community brands
6	Individual tourism business brands

when considering that a major product supplier, such as Stonehenge in the south of England, Legoland in California, Sea World on Australia's Gold Coast, and Disneyland Resort Paris, might have different destination umbrella brands at the LTA, RTO, STO, and NTO levels with which they work with. A destination may be viewed as the umbrella brand, with individual products as sub-brands. Flagestad and Hope (2001) suggested that an umbrella brand for Scandinavian tourism suppliers could prove an efficient means of addressing image problems in non-Nordic markets. Such an umbrella brand can be used to endorse the credibility of the tourism sub-brands. The Australian Tourism Commission has assisted STOs such as the Western Australia Tourism Commission with brand development. Another example is the proactive role played by Tourism Queensland in developing regional brands within the state. The incentive for the RTOs is funding by Tourism Queensland to a level that can exceed the contributions of local shire councils. The concept of destination umbrella branding is related to the consumer goods strategy of applying the name of a brand to a broad range of products. The purpose is to spread positive elements of a brand's value over multiple products, through transfer phenomena such as semantic generalisation (see, for example, Mazanec & Schweiger, 1981). Potentially, the marketing efforts of each product within the brand hierarchy can flow across to other partners.

- **The brand makes use of, and coordinates, a full repertoire of marketing activities.** If it is accepted that the focus of marketing activity is to enhance consumer-based brand equity; this is a critical issue for DMOs, and one over which the organisation exerts control.
- **The brand's managers understand what the brand means to consumers.** This emphasises the importance of establishing and monitoring a focused brand positioning strategy for the destination, based on sound research to stimulate congruence between the brand identity and the brand image.
- **The brand is given proper support, and that support is sustained over the long run.** Senior management must genuinely share the belief that brand building results in a profitable competitive advantage (Aaker & Joachimsthaler, 2000). More case studies examining the long-term effectiveness of destination brands are required, particularly in terms of monitoring the long-term nature of the investment.
- **The organisation monitors the sources of brand equity.** Keller (2000) used the example of a brand audit undertaken by Disney during the 1980s, to highlight how such sources could be diluted in value. The audit found that the Disney characters, which were the main source of brand equity, were overexposed in the market through a myriad of product endorsements and licensing agreements. The serious impact of this commercialism resulted in strong negative perceptions of the brand by consumers. The Disney example highlights the value of developing a system of brand-equity management. This begins with a brand charter, detailing the philosophy of the brand and the value of branding, details of brand audits, tracking and research, and guidelines for strategies, tactics, and treatment of the brand's visual components. Within this system,

there must be effective communication between key stakeholders and marketing decision-makers.

Destination branding case studies

Case studies similar to Keller's (2000) that analyse leading destination brands to identify CSFs for DMOs will be invaluable. However, as has been stated, the number of published destination brand case studies have only emerged recently, and there a need for more case-study-based research into the long-term effectiveness of destination brand management. Relative to the number of papers published on destination image, there have been few reporting destination branding case studies. Given the recent emergence of the destination branding literature it is not surprising that the focus of cases published to date has been on brand development. With the exception of Curtis' (2001) analysis of Brand Oregon, there has been a lack of case studies examining the long-term management and effectiveness of destination brands. The case studies published to date do however provide valuable insights into the practical challenges of applying brand theory to destination brand development, particularly since most have been written by practitioners involved in the brand campaigns. Appendix 10.1 briefly summarises the contribution of six such cases:

- Brand Oregon (Curtis, 2001)
- Ohio's identity crisis (May, 2001)
- Wales' natural revival (Pride, 2002)
- Brand Western Australia (Crockett & Wood, 1999)
- War-torn central and eastern Europe (Hall, 1999)
- New Zealand's global niche (Morgan et al, 2002).

Destination brand identity development

As presented in Figure 10.1, three interrelated components of the destination brand construct are brand identity, brand position, and brand image. Brand identity has an internal focus on issues such as self-image and a vision for motivating stakeholders, while brand image represents the actual image held in the market. Brand positioning is the potential interface between the two. Destination brand identity development essentially involves four stages: (1) the appointment of a brand champion, (2) identification of the brand community, (3) a destination audit, and (4) production of a brand charter.

Brand champion

You create passion for brands first of all by example. It depends on the attitude of top management. If you are totally convinced, you become a missionary salesperson, so to speak, within the company.

This comment from a former head of marketing for Nestlé was cited by Urde (1999, p. 124), whose analysis of brand-oriented companies identified a characteristic passion for the brand. The appointment of a brand manager is an important precursor to the destination brand development. As evidenced in the case of Wales in Appendix 10.1 (see Pride, 2002), a lack of leadership can inhibit the brand's development, particularly in the initial phase. Such a role will vary depending on the size of the DMO, but will nevertheless be driven by the same principles. Branding is a complex and challenging process, and leadership, responsibility, and accountability is required. At the NTO level there have been a growing number of brand manager appointments made since the mid-1990s, such as by the Scottish Tourist Board and British Tourist Authority for example, reported by Pritchard and Morgan (1998). Clearly, the case studies written by those intimately involved with destination brand development show a passion for the cause. Such brand managers must in effect be brand champions, since 'many practitioners currently responsible for marketing destinations also regard the branding process with suspicion' (Pride, 2002, p. 110).

If the bottom-up philosophy to brand development is to be adopted it is doubtful an outsider, such as a brand consultant, will be successful in championing the process over the longer term. I am aware of the problems encountered by one RTO which delegated too much responsibility, not to mention finance, to a high-profile and articulate brand consultant, who it turned out was also commissioned by at least two competing destinations. Not surprisingly there was a strong similarity in the three destinations' brand themes. The brand champion must be seen to be part of the community. In this regard, there is in some cases a fine line walked by Brisbane-based Tourism Queensland staff who play a key role in brand development for many of the state's RTOs.

Brand community

> *How can we influence the trade and local authorities to support the WTB brand and the values that have been developed? (Wales Tourism Board Policy Framework Review – Competitiveness and Quality. Accessed at http://capture.wtb.lon.world.net/ 22/10/03.)*

The effective development and nurturing of the destination brand will depend on the identification of a brand community. Ultimately, the destination brand community will be as important a brand communications medium as any advertising campaign, since it is they who must deliver the brand promise. Therefore it is critical that the brand identity encapsulates the values of the community, the essence of the visitor experience, as well as provide a vision to guide and motivate active stakeholders.

Any destination brand must represent local residents' sense of place … this is their home. The Oregon case in Appendix 10.1 (see Curtis, 2001) demonstrated the importance of avoiding a top-down approach by involving the local tourism industry. Research in Singapore (Henderson, 2000) suggested that the views of the host community must be taken into account (see Research Snapshot 10.2), while the Morocco experience (Vial, 1997, in Morgan & Pritchard, 1998) demonstrated the influence of travel intermediaries. There may also be a view within the community that branding of the place is not appropriate, and this needs to be ascertained. It has been asked whether selling a city to tourists is a Faustian bargain (Holcolmb, 1999, p. 69):

> *Packaging and promoting the city to tourists can destroy its soul. The city is commodified, its form and spirit remade to conform to market demand, not residents' dreams. The local state and business elites collude to remake a city in which their special interests are paramount; meanwhile, resources are diverted away from needy neighbourhoods and social services.*

This view is not often reported in the literature, perhaps due to the lack of research into the host community's views on branding 'their place'. Brand consultant Wally Olins (Olins, 2002) commented on the 'visceral animosity' of some people towards the concept of a nation as a brand. As an example Olins cited Girard's (1999, p. 241) view of the inappropriateness of a brand for France:

> *In France the idea of re-branding the country would be widely unacceptable because the popular feeling is that France is something that has a nature and a substance other than that of a corporation … A country carries specific dignity unlike a marketed product … In France it is unimaginable for Chirac to attempt to re-brand.*

Also important are members of the wider business community, who may not view tourism as being their core business, but who may nevertheless be indirectly involved in providing goods or services. For example, these include such diverse groups as local produce suppliers, architects, real estate agents, hairdressers, and employment agencies. A destination brand community consists therefore not only of local tourism providers but also the host population, local business community, and key travel distribution intermediaries. After all, tourism, as Gnoth (1998) reminded us, is user-defined, and the product is not controlled by any one channel power structure.

Research snapshot 10.2 The host community

Research into the perceptions of *New Asia – Singapore* by Henderson (2000), highlighted the real world challenges involved in gaining acceptance of the brand. While the development of the brand, which was launched in 1996, has been well documented (see, for example, STPB, 1996), Henderson argued that the actual impact of the branding efforts was uncertain. A small exploratory survey of local residents and English-speaking visitors revealed gaps between actual perceptions (brand image) and the intended brand values (brand identity). Concerns about place commodification were also evident. Sample limitations aside, Henderson's study insightfully highlighted the importance of consultation with the host community to ensure that what is being communicated in brand strategies is both realistic and appropriate (p. 215):

> *When residents are called on to live the values of the brand in pursuit of tourism goals, it would seem that marketers are in danger of assuming too much influence and a sense of balance needs to be restored. Societies cannot be engineered or places manufactured for tourist consumption without a loss of authenticity which is ultimately recognised by the visitor who will move on to seek it elsewhere.*

Source: Henderson, J.C. (2000). Selling places – the new Asia Singapore brand. In Robinson, M., Evans, N., Long, P., Sharpley, R. & Swarbrooke, J. (eds), ***Management, Marketing and the Political Economy of Travel and Tourism***. Sunderland: Centre for Travel & Tourism, pp. 207–218.

A strong brand can be a unifying force for increased cooperation by all stakeholders, as observed by Curtis (2001) in the case of Oregon. Likewise, Hawes et al. (1991) found a number of USA STOs that employed a statewide slogan as a unification mechanism. The formation of a project group that is representative of the brand community can act as a conduit between the DMO and the community, help identify stakeholder groups warranting involvement in qualitative discussions on place meaning, assist the brand manager with the development of recommendations for the DMO board, and help develop means of briefing the community on the purpose and role of the brand. Admittedly, the selection of such a representative group will always be problematic, in terms of achieving a political balance and a manageable size.

The primary role of a working group will be to develop the means for investigating (1) the host community's values and sense of place, (2) the tourism community's view of the essence of the visitor experience, and (3) the destination's tourism resources. The purpose of this stage is to identify the core values of the destination, to work towards the development of a destination brand identity.

Brand charter

It has been suggested in the chapter that the brand should be the foundation for all marketing planning. Indeed, the idea of thinking about the destination as a brand might represent a new way of thinking to many stakeholders. A brand charter can serve to motivate, remind, and guide stakeholders. Like any formal planning document, the key to readability and application is succinctness. Essential elements include, but are not limited to: a brand mission, vision, brand identity/essence statement, brand values, and guidelines for implementation and auditing. The brand mission summarises the reason for the brand's existence. For example, the following statement of Tourism Australia leaves the reader with no doubts about the importance of the brand to the organisation:

> *Brand Australia is the essence of all ATC activities. It guides the tone, design, and imagery used in all ATC communications to consumers, the travel trade and tourism industry. It forms the basis of all television, cinema, print, and online advertising as well as PR, direct mail, travel guides, internet, and trade marketing activities (ATC, 2003).*

Urde (1999, p. 126) suggested a brand vision is also required to answer the following questions: What do we want to achieve with our brand? How will the organisation realise this vision? The brand essence statement is the articulation of the brand identity. This has also been described as a brand mantra by Keller (2003), who suggested a three- to five-word statement that clearly defines the focus and boundary of the brand category, such as authentic athletic performance (Nike) and fun family entertainment (Disney). Aaker and Joachimsthaler (2000) suggested that a brand identity will usually have two to four dimensions, as well as a focused brand essence statement. They offered the example of Virgin's core identity dimensions being service quality, innovation, fun and entertainment, and value for money, while the brand essence statement is iconoclasm. The purpose of the brand essence statement and core values is to guide and motivate those within the organisation, and will not necessarily be explicit in all promotional communications. In the case of Rotorua, New Zealand, (Tourism Rotorua, 1996, p. 2) the purpose of the brand identity was fourfold:

- to reflect reality by making a compelling and believable statement about the unique qualities of the district
- to encompass all aspects of the destination by developing a theme to fit with all community and commercial applications
- to be meaningful and motivational by avoiding empty clichés and creating an idea to inspire both interest and action
- to have lasting value by remaining relevant to the aspirations of the destination for many years to come.

Examples of destination brand identities and core values from a selection of NTOs, STOs and RTOs are shown in Table 10.3.

At the risk of appearing bureaucratic, an important document for DMOs responsible for coordinating the efforts of a multiplicity of stakeholders is a brand policy manual that provides guidelines for use of symbols by the local tourism industry and intermediaries. The purpose is to ensure a consistency in application. While guidelines can be distributed in brochure form, a more cost-effective approach is the internet, such as in the case of Fraser Coast, Australia (http://tq.com.au/destinations/fraser-coast/marketing/creative-toolbox/creative-toolbox_home.cfm).

Table 10.3 Destination brand core values

Destination	Brand identity	Core brand values
Wales (Pride, 2002)	In Wales you will find a passion for life – Hwyl	Lyrical, sincere, confident, inviting, down to earth, warm
Australia (ATC, 1997, in Morgan, 2000)	Brand Australia	Youthful, energetic, optimistic, stylish, unpretentious, genuine, open, fun
New Zealand (Morgan, Pritchard & Piggott, 2002)	New Pacific freedom	Contemporary and sophisticated, innovative and creative, spirited and free
Western Australia (Crockett & Wood, 1999)	Brand Western Australia	Fresh, natural, free, spirited
Rotorua (Tourism Rotorua, 1996)	Feel the spirit Manaakitanga	Cultural diversity, stunning natural environment, awe-inspiring earth forces, sense of adventure, people, progressive community

Key points

1. The role and importance of branding

It has been suggested that the future of marketing will be a battle of the brands, and that in tourism, destinations are emerging as the world's biggest brands. The concept of branding consumer goods has attracted research interest in the marketing literature since the 1950s. In the time since, a rich resource of information has been developed to guide product marketers. However, in the tourism literature, the issue of branding destinations was not reported until the late-1990s. While interest in the field is increasing, there remains a dearth of published information to guide destination marketers. This represents a significant gap in the literature given the acknowledged importance of brands in competitive markets and the emergence of destinations as the tourism industry's biggest brands. While many aspects of brand theory have applications for DMOs, the process of branding destinations is a more complex undertaking than that for most consumer goods and services.

2. Brand identity

The purpose of a brand is to establish a distinctive and memorable identity in the marketplace that represents a source of value for the consumer. For DMOs, the value of strong consumer-based brand equity lies in the opportunity to minimise destination switching through a differentiated value proposition and increased loyalty. The fundamental challenge for DMOs is to somehow develop a brand identity that encapsulates the essence or spirit of a multi-attributed destination representative of a group of sellers as well as a host community. Such a brand identity should serve as a guiding focus for the marketing activities of the DMO and stakeholders.

3. Consumer-based brand equity

Little has been reported on the effectiveness of destination brand campaigns. A useful hierarchy for tracking effectiveness is consumer-based brand equity (CBBE). CBBE is operationalised by measuring brand awareness, associations, resonance, and loyalty.

Review questions

- To what extent does your destination's branding slogan represent your own sense of place?
- To what extent does your destination's branding slogan capture the main attractions?

Appendix 10.1 Destination branding case studies

Case 1 Brand Oregon

> ***Oregon. Things look different here.*** *In conjunction with the world-famous advertising agency, Wieden + Kennedy, the Oregon Tourism Commission has worked for 15 years to differentiate Oregon's travel product from its neighbours and attract visitors with this creative tagline that supports what the commission calls 'Brand Oregon' (Oregon Tourism Commission 2003–2005 Strategic Marketing Plan).*

One of the most cited destination branding cases has been Curtis' (2001) candid evaluation of the evolution of Brand Oregon. Curtis wrote from the perspective of a senior research executive with the Oregon Tourism Commission (OTC). The paper provided a balanced discussion on the strengths and weaknesses of the 'Oregon – things look different here' brand campaign during the 1980s and 1990s. Impetus for the brand's development was an ailing state economy, and the approach of the campaign was to develop an umbrella brand for both tourism and economic development. Curtis observed that this proved a difficult fit and that the strength of the tourism/economic development connection fluctuated over time.

To achieve brand consistency, the tourism component of the strategy required all RTOs that received state funding to use the OTC's advertising agency. While the rationale for this approach was to achieve a consistency of promotional material, ultimately the top-down approach met resistance from the regions. However, the initiative did result in an increased awareness of the potential for cooperative marketing efforts.

Initially, the brand campaign resulted in a dramatic increase in the level of visitor enquiries, which, combined with a number of marketing awards, were regarded as positive performance indicators. More comprehensive measures were later developed to measure consumer perceptions, which ultimately are a more effective indicator of a brand's success than award ceremonies. The case provided a brief but insightful glimpse at the challenges involved in the development, implementation, and management of a state destination brand over time. The paper concluded with a summary of four key lessons learned. First, avoid a top-down approach of imposing a branding system on tourism business. Second, build on the destination's strengths and integrate newer images. Third, continually evaluate the effectiveness of the brand. Fourth, develop a long-term commitment to the strategy. Regarding the final point, at the time of writing the brand theme was still in use by the OTC, with the organisation calling for more support by other state agencies in its *2003–2005 Strategic Marketing Plan*:

> *Much more could be accomplished with a cohesive branding effort being adopted by all state agencies involved in promoting Oregon and state products (www.traveloregon.com/OTC.cfm, 9/10/03).*

Case 2 Ohio's identity crisis

At the 2001 TTRA conference, May (2001) presented the process used to develop a new tourism brand for the state of Ohio. Previously the Ohio Division of Travel and Tourism had been successfully leveraging the advertising budget by using cooperative campaigns with industry partners. However, the partners were dominating the messages, and as a result Ohio suffered from a lack of a distinctive image in the market. As a tourism destination, Ohio had an identity crisis. The STO recognised the potential benefits of effective branding, and so a commitment was made to develop a new tourism brand that would feature in all communications.

The new brand development involved two initial research phases. Stage 1 used open-ended questions in interviews with 375 callers to the STO's free consumer enquiry line 1-800Buckeye, as well as a series of focus groups in three out-of-state markets. A key question posed in the telephone interviews was: 'How would you describe Ohio to someone who has never been here before?' The four most common responses were: 'variety of things to see/do', 'beautiful country, scenery and natural places', 'theme parks', and 'friendly people'. The purpose of the focus groups was to identify positive and negative perceptions of the state. The three key positive perceptions identified were 'amusement parks', 'a place for children', and 'shopping', while two key negative perceptions were 'rustbelt' and 'congested'. The focus groups also suggested a lack of awareness of major destination features, such as: nature, history, scenery, lots to see/do, and culture.

The second research stage involved a structured questionnaire containing a battery of 75 image attributes. This was distributed to 3800 consumers in different markets. The results identified the 'hot button' attributes desired in a holiday destination by the target audience. For these attributes, survey participants rated their perceptions of Ohio and key competitors, which were: Michigan, Pennsylvania, Indiana, Illinois, Kentucky, and West Virginia. This competitive analysis identified Ohio's key strengths and weaknesses, which are listed in the Table below:

Ohio's strengths	**Ohio's weaknesses**
Affordable	Scenery
Theme parks	Nature
Children enjoy	History
Close distance	

From the results, the STO identified the core challenge as being the creation of an emotive message that would overcome the weaknesses and change perceptions. A number of brand slogans, along with associated music and imagery, were developed and tested in key markets. These included:

- Ohio…Oh!
- Ohio…Where America comes to play

- Ohio, the thrill of it all
- Ohio…Where the fun never sets
- Ohio Oh WOW
- Ohio, Let Yourself Go!

The selected brand slogan, 'Ohio – so much to discover', was introduced and tested in 2000, with full implementation during 2001. The Ohio Division of Travel and Tourism claims the most frequently called state tourism free-phone hotline in the country. The call system responds to approximately 1.5 million inquiries annually (http://www.odod.state.oh.us/Travel.htm, 13/11/03). The presentation by Colleen May (May, 2001), Research Manager for the Ohio Division of Travel and Tourism, provided TTRA conference delegates with an insider's perspective of the steps involved in destination branding, and as such represented a much-needed interaction between a tourism practitioner and tourism academics.

Case 3 Wales' natural revival

> *For many years that venerable and respected British oracle of information and explanation, the* Encyclopaedia Britannica*, essentially denied Wales' existence. Under the entry for Wales it simply stated 'for Wales please see England'* (Pride, 2002, p. 109).

Another insightful practitioner perspective on destination branding was provided by Pride (2002), Director of Marketing for the Wales Tourist Board (WTB). Pride discussed the problems associated with a lack of national identity for a country that has historically been seen by the world as a suffix to England. For example, the nation has often been referred to as 'and Wales'. During the 1990s, research undertaken by the WTB and other organisations was consistently pointing to negative perceptions as a primary hindrance to the country's economic development. Tourism was one of a number of export industries affected by either negative or distorted images. Pride described the process and challenges of developing a brand strategy aimed at turning Wales' 'identity deficit' into an 'identity premium'.

Travellers from Wales' traditional markets of England's northern industrial cities had become more experienced and sophisticated in their holiday needs and expectations. They had also been increasingly drawn away to Europe's cheap sunshine destinations. These trends have forced significant structural changes in the Welsh tourism industry. Pride reported that while the tourism industry had responded with necessary high-quality accommodation and recreation facilities, the negative image remained a significant barrier to growth:

> *We recognized that if we going to enhance Wales' reputation as a leisure destination, we needed a single-minded, consistent, integrated, and innovative communication strategy* (Pride, 2002, p. 112).

A framework was designed to subsume a new tourism destination brand development and communication strategy under the umbrella of a new nation brand. Pride reported that the development of the country brand was the most difficult part of the entire process, primarily due to a lack of government leadership and responsibility. The intent for the tourism brand was to develop one key positioning theme, which could be adapted to suit individual markets. This was complicated by the results of extensive research by the WTB that identified significant differences in both the perceptions of Wales and the holiday needs of international and domestic travellers. Ultimately, 'natural revival' was selected as the brand positioning, based on the following qualities: unspoiled, down-to-earth, traditional values, back in time, genuine, beautiful, physical, spiritual, and hidden on England's doorstep.

A summary of the brand's implementation in the domestic and international markets, key results, and an impressive list of marketing awards are included in the paper. Pride concluded with a candid acknowledgement that the brand was still in its infancy and discussed future challenges, central to which was the real need to ensure that the brand promise is actually delivered at the destination. The case provided a rare insight into a DMO's approach to one of the core questions of this text, that is, is one position for a multi-attributed destination suitable for all markets?

Case 4 Brand Western Australia

The Western Australian Tourism Commission's (WATC) approach to branding the state was reported by the STO's CEO and brand manager (see Crockett & Wood, 1999). The authors advised the development of a new brand strategy in the 1990s which not only resulted in a successful global repositioning but also an 'entire organisational shift' (p. 276). Western Australia's landmass represents one-third of the Australian continent, a rich tourism resource with significant variations in geography and climate between different regions. In the early 1990s, WATC research found that the state lacked a meaningful identity, particularly in international travel markets. Crockett and Wood reported the development of Brand Western Australia (Brand WA), which would drive all marketing activities. The new brand was launched in 1996 and went beyond being a market repositioning campaign:

> *Brand WA provided the catalyst for an entire organisational restructure within the WATC. This reflects a new corporate culture, new direction, increased accountability, performance measurement, partnerships with industry, and a clear customer focus* (Crockett & Wood, 1999, p. 278).

The budget for developing and implementing an international brand strategy was limited to AUD$8.8 million over five years. The process began with the formation of a representative 'brand strategy group', to oversee the project. Significantly, Brand WA was to be a state brand, rather than only a tourism brand. Furthermore, the brand would attempt to maximise synergies with the ATC's Brand Australia. ATC representatives were therefore involved in the development of Brand WA. Other tourism partnerships established during the development phase extended to the formation of ten regional tourism organisations within the state.

The market research programme focused on consultation with end-users of the brand, as well as qualitative studies in domestic and international markets. The key questions raised were (p. 280):

- What are the attributes tourists rank as high motivators for their travel?
- What are the consumers' perceptions of Western Australia and Perth as a holiday destination?
- What do travellers imagine when they think of Western Australia and Perth?
- What are the state's major strengths and weaknesses as a holiday destination in the eyes of consumers?

While the research revealed positive perceptions of nature-based attractions, the lack of a distinctive image was also apparent. Due to limited financial resources available to address the lack of identity on a global scale, a 'Market Potential Assessment Formula' was then developed to prioritise target markets. The formula was based on the criteria of access, growth rate, market share, and synergy with ATC activity. Crockett and Wood reported the formula was used twice a year to monitor market shifts.

The market research enabled the development of a brand identity and a five-year strategy for increasing market exposure, industry partnerships, and developing new infrastructure and tourism products. The paper described many elements of the marketing mix, media campaign, regional brand extensions, and performance measures. For example, it was estimated that an initial six-week campaign in the UK resulted in 5886 visitors who spent AUD$7.3 million within the state.

Case 5 War-torn Central and Eastern Europe

Hall (1999) provided a rare analysis of the branding opportunities and challenges faced by what are predominantly fledgling destinations in post-communist Central and Eastern Europe (CEE). Tourism earnings in the region had lagged behind the rest of Europe for a number of reasons, including a short length of stay and low spending tourists from other CEE countries. Destination branding by CEE countries was constrained by lack of finance, lack of international marketing experience, and public pressure for short-term results. To illustrate the destination branding challenges faced in the region, Hall focused on Slovenia and Croatia. As new states, which were part of the former Yugoslavia, both have needed to establish national identities untainted by the conflict in the Balkans. For example, despite a long history of tourism promotion as part of Yugoslavia, post-war Slovenia faced the challenge of re-attracting previously established markets. Although Slovenia gained independence in 1991, an NTO was not established until 1996. The Slovenia Tourism Board's brand strategy was to position the destination as a western civilised country with contiguity to Austria and Italy, and away from the Balkan association. However, the destination found it difficult to achieve the numbers of visitor arrivals generated when part of the pre-war Yugoslavia federation. Hall suggested that the promotional material used to support the brand did not adequately and clearly convey a unique position for the country.

Containing most of the former Yugoslavia's coastline, Croatia was a major benefactor of tourism in the region. Following the war years it was important therefore for Croatia to establish a national tourism brand strategy that would 'convey a distinct image to clearly differentiate the country from its neighbours and reassure former markets that quality and value had been restored' (Hall, 1999, p. 234). However, Hall observed that initial branding attempts failed to differentiate the destination from others in the region. The cases demonstrate the challenges faced by war-torn countries attempting re-branding away from the former negative associations of communism and conflict. Hall concluded destination branding was poorly developed in CEE countries, and called for a more collaborative approach between private and public sectors. Although Hall found little evidence of coordination between local, regional, and national tourism interests, he admitted the issue was politically complicated (p. 235):

> *This is understandable given that over much of the region there has been a desire to reduce any form of centralised planning as a reaction to the previous half-century of state socialist impositions.*

The development of national brands in the 're-imaging' of former Yugoslavia has also since been discussed by Hall (2002) and Martinovic (2002).

Case 6 New Zealand's global niche

> *Global competition in the world of destination marketing has never been more intense. September 11, 2001 focused the spotlight on the travel and tourism industry around the world with troubled airlines and nervous passengers creating unprecedented uncertainty … In such a competitive environment, it is more vital than ever that those marketing a destination can make their voice heard. The 100% Pure New Zealand global marketing campaign was instigated in 1999, with the purpose of achieving this cut-through (Tourism New Zealand, 2003 – www.tourisminfo.co.nz, 22/10/03).*

Morgan, Pritchard and Piggott (2002) promote a critical exploration of Tourism New Zealand's (TNZ) development of the 100% Pure New Zealand as a powerful niche travel brand. With one of the authors acknowledged as a TNZ staff member responsible for promoting the brand internationally, the case represents a much-needed destination practitioner/academic collaboration. Launched in 1999, '100 per cent Pure New Zealand' was the country's first global tourism brand. Prior to this, different campaigns had been used in different markets. New Zealand is a small, geographically disadvantaged player in the international travel market, with a relatively small NTO budget. TNZ recognised that to be more competitive on the international stage, particularly against larger neighbour Australia, required the development of a single niche brand across all markets. The vision was to position New Zealand as the world's ultimate travel destination, with a key output being to double international tourism receipts by 2005.

The focus of Morgan, Pritchard and Piggott's paper is the UK phase of the brand research and positioning implementation. Within New Zealand, significant research was undertaken in the development of the brand strategy, including surveys of local businesses, regional economists, and previous visitors. The UK research stage, which was one of a number of overseas market analyses, involved a series of 28 in-depth interviews and four focus groups. These were used primarily to identify long-haul travel motivations/needs/barriers, perceptions of New Zealand, and effective communication propositions. The paper provided a summary of UK traveller types and their needs and motivations. New Zealand was seen to appeal to a number of distinctive segments, particularly those motivated to travel for reasons of special interest or 'real travel', which was described as 'serious, adventure travel and a trip of a lifetime' (Morgan, Pritchard & Piggott, 2002, p. 344). The key perceptions held of New Zealand were: 'sense of achievement and prestige in visiting', 'adventure', 'landscape of contrasts', 'good quality wine reputation', 'friendly and welcoming', 'space and freedom', 'nature/outdoors', and 'fresh pure air'. However, major barriers to travel included: long travel distance and costs, concern that New Zealand only offered an outdoor experience, the weather, lack of things to do, and the country's conservative and serious image (p. 345):

> *The branding consultants' research concluded that the outside world sees New Zealand as being full of green hills, sheep and aggressive Maori warriors, and that it is somewhat boring.*

The mixed findings motivated TNZ to develop a position that focused on 'energising the traveller'. The process resulted in the brand being 'New Zealand', the brand essence 'landscape', the positioning 'New Pacific Freedom', and the global campaign slogan '100 per cent Pure New Zealand'.

During the first year the global brand campaign attracted financial support from 102 industry partners in 13 countries. This was seen as a critical success factor for an NTO with limited funding. The authors might also have added that TNZ's limited international advertising budget is also in New Zealand dollars, which is significantly discounted to all major currencies. The contribution of this case for destination marketers is the emphasis on the importance of extensive research, the need for a collaborative approach to implementation, the value of public relations and the WWW as brand promotion vehicles, and the need for a long-term commitment to the brand. In New Zealand's case the most significant long-term challenge lay in combining the brand essence 'landscape' with a globally unique point of difference.