



Handbook on Tourism Destination Branding



With an introduction by Simon Anholt



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ISBN: 978-92-844-1311-9 (UNWTO)

ISBN: 978-92-990050-6-4 (ETC)

Published by the World Tourism Organization and the European Travel Commission
Printed by the World Tourism Organization, Madrid, Spain
First printing 2009
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Acknowledgements

This handbook was written by Mr Tom Buncle, Yellow Railroad International Destination Consultancy, with valuable input from Ms Mady Keup, CERAM Business School and Associate of Yellow Railroad.

The handbook, which forms part of ETC's ongoing Market Intelligence Programme, was carried out under the supervision of Ms Lisa Davies (ETC) on behalf of ETC's Market Intelligence Group (MIG) in collaboration with Ms Sandra Carvão from UNWTO's Market Trends, Competitiveness and Trade in Tourism Services Section.

The members of the ETC's Market Intelligence Committee who contributed to this handbook were:

Mr Leslie Vella, (Chairman MIG and Malta Tourism Authority), Ms Lisa Davies (ETC Executive Unit), Mr John Kester and Ms Sandra Carvão (UNWTO), Ms Carla Aguirre (VisitSweden), Ms Gaëlle Berréhouc (Atout France/Agence de Développement Touristique de la France), Ms Ylva Björnberg (VisitSweden), Mr Christian Brandt (VisitDenmark), Mr David Edwards (VisitBritain), Ms Belen Gonzalez (Turespaña), Mr Brian Maher (Fáilte Ireland), Mr Joachim Scholz (German National Tourist Board), Ms Anna Siemianowska (Polish Tourist Organisation), Ms Judit Sulyok (Hungarian National Tourist Office), Ms Helena Varona (Turismo de Portugal) and Mr Tom Ylkänen (Finnish Tourist Board). Additional input was provided by Ms Małgorzata Nowinska (University of Bedfordshire).

We also owe our special thanks to Mr Simon Anholt, author of the *Anholt Nation Brands Index* and editor of the *Journal of Place Branding and Public Diplomacy*, for contributing the essay 'Why National Image Matters'.

The handbook would not have been possible without the advice and expert contributions of many branding professionals from around the world. We acknowledge their inputs at the relevant points in the text throughout the book, with our grateful appreciation.

We would like to express our particular appreciation to the following branding experts who participated in the International Advisory Panel which reviewed the document for accuracy and practical relevance:

- Mr Roger Pride, Welsh Assembly Government/Visit Wales;
- Ms Shareen Thude, Namibia Tourism Board;
- Mr Richard Beere, Tourism Australia;
- Ms Sue Warren, SNV Netherlands and formerly The New Zealand Way.

Technical input was provided by the following:

- TNS Travel & Tourism (UK) on Measuring Brand Impact;
- Mr David Reid of *becausebrandsmatter.com* (UK) on *The Brand Wheel and Writing a Creative Brief*.

Why National Image Matters – By Simon Anholt

When I started writing about an idea I called ‘nation brand’ nearly fifteen years ago, I made a simple observation: that the reputations of countries are very much like the brand images of companies and products. I suggested that a country’s image is just as important to its progress and prosperity as a company’s brand is to its success in the marketplace, because it exerts so much influence over the behaviours and attitudes of that country’s ‘target audiences’: foreign investors, tourists, consumers, students, entrepreneurs, trading partners, the media, other governments, donors, multilateral agencies, or any number of other constituencies.

Today, every country, city and region on earth must compete with every other for its share of the world’s commercial, political, social and cultural transactions in what is virtually a single market. As in any busy marketplace, brand image becomes critical: almost nobody has the time, the patience or the expertise to understand the real differences between the offerings of one country and another, and so people fall back on their fundamental beliefs and prejudices about those countries to help them make their decisions. Just as in the commercial marketplace, that ‘brand image’ provides a short cut to an informed buying decision.

Countries with a reputation for being poor, uncultured, backward, dangerous or corrupt will find that everything they or their citizens try to achieve outside their own neighbourhood is harder, while countries that are lucky or virtuous enough to have acquired a positive reputation find everything easier. Their brand goes before them like a calling card that opens doors, creates trust and respect, and raises the expectation of quality, competence and integrity. In this way, the reputation of a country has a direct and measurable impact on just about every aspect of its engagement with other countries, and plays a critical role in its economic, social, political and cultural progress.

For the travel and tourism industry, national image is fundamentally important. The tourist board needs to ‘sell the country’ to a vast international audience of ordinary consumers as well as a highly informed professional cadre of tour operators and other influencers, and the background reputation of the country ultimately determines whether that ‘selling’ process is easy or difficult, expensive or cheap, simple or complex – and whether it gets gradually easier and more efficient over time, or whether it remains forever a struggle. A country’s reputation determines whether its messages are welcomed, and whether they are believed.

This is the reason why the concept of destination branding has become so important. The idea of ‘brand equity’ sums up the idea that if a place, product or service acquires a positive, powerful and solid reputation, this becomes an asset of enormous value – probably more valuable, in fact, than all its tangible assets, because it represents the ability of the place or organization to continue to trade at a healthy margin for as long as its brand image stays intact. Brand equity also represents the ‘permission’ given by a loyal consumer base for the company or country to continue producing and developing its product range, innovating, communicating and selling to them.

Put simply, a destination with a powerful and positive image needs to do less work and spend less money on promoting itself to the marketplace, because the marketplace already believes what it is telling them. It merely has to help buyers find and purchase the product.

But destinations with powerful brands have a different task, one that destinations with weak brands do not have. Just like any respected corporation, a highly regarded place has a big responsibility to ensure that the reality always lives up to its reputation. Indeed, in order to protect itself against competitors, such a place must **exceed** expectations through constant innovation. This task can of course be just as costly and just as challenging as building a reputation in the first place, but having a good reputation

does at least provide a steady flow of revenue to fund this work on the 'product' itself; so at one level, brand equity is as much about cashflow as anything else.

The idea of destination branding is important because it takes into account these important questions relating to the deliberate **capture** and **accumulation** of reputational value. Ordinary tourism promotion, when it is carried out with no particular long-term national strategy in mind apart from growth, is an endless cycle which may or may not lead to real progress in the longer term.

Unlike brand management, it is mainly about selling. It can certainly be effective at doing this, but unless the selling is directed and driven by an underlying brand strategy, there is little chance that the country as a whole will acquire any substantial brand equity, and so the promotional task never gets any easier or cheaper, and there is little chance that a price premium will ever be justified in the eyes of the consumer. The basic principle of destination branding is that every act of promotion, exchange or representation needs to be seen not as an end in itself but as an opportunity to build the country's image and reputation.

Today, nobody really doubts that understanding, measuring, and even managing the 'nation brand' is one of the primary tasks of responsible governments and businesses, or that this brand equity is the fundamental currency of all tourism promotion. But the all-important question of what – if anything – can actually be done to enhance or maintain a positive reputation, is barely understood at all.

Where national image comes from

All countries, at some level, get the reputation they deserve, and the only absolutely sure way to achieve a good 'nation brand' is to become a fair, prosperous, well-run and successful country. The problem, however, is that national reputation exerts enormous inertia, and generations can pass before improvements in the reality of the country eventually result in an improved image. It is because this process can take so long if left to 'natural' forces that nation branding, believed to be a technique with the power to shorten this problematic lag, creates so much interest.

I would be the first to admit that 'nation branding' is an unfortunate expression, since it seems to imply that branding the nation is both a desirable and a possible thing for countries or their governments to do. I would argue that branding – the act of reducing something chaotic, complex and contradictory to something simple, memorable and potent – is exactly the **wrong** thing for most countries to attempt. Branding is more like a problem than a solution, and it is in fact exactly what public opinion does to countries. What countries and their governments need to do is **fight against** this tendency of public opinion to brand the nation, not to assist in the process.

Even if it were desirable, I doubt whether 'doing branding' to a country is really possible: all the available evidence suggests that the brand images of nations are remarkably stable, and highly resilient to deliberate manipulation. The Anholt Nation Brands Index (NBI), which since early 2005 has been tracking and analysing the global images of 40 countries using a panel of nearly 30,000 respondents in 35 countries, shows that almost no country's image has changed by more than 1% during this period. Furthermore, there is no correlation between these changes in image and the efforts made by any country to affect its image: indeed, some of the countries that have spent most money on improving their images have experienced the steepest declines in their brand equity, whilst others have spent virtually nothing and seen their stock rise steadily throughout the last four years of the study.

The 'stickiness' of national image is mainly due to the fact that most people do not think very much or know very much about other countries: those simple, widely-accepted narratives about other countries are so deeply rooted in the culture of the populations which subscribe to them that they become virtually impossible to shift. To imagine that such fundamental beliefs can be affected by so weak an instrument as marketing communications is an extravagant delusion.

The role of communications

Marketing communications can be an excellent tool for selling vacations and other products and services, but not for manipulating fundamental cultural precepts like national image.

The nation's image was not built through communications, and it cannot be changed through communications. Managing the nation's image is not an advertising, design or public relations exercise, although of course these techniques are essential for promoting the things that the country makes and does: its tourism and heritage attractions, its companies and their products and services, its music and art and other cultural products, its sport, its people, its investment and employment opportunities. The quality of the marketing done by all of these stakeholders, and the consistency between the different messages they send out about the place, are important factors in the way the place builds up its reputation – and of course good advertising often plays a major part in creating the positive tourism brands that many countries enjoy today.

But a good destination brand is not at all the same thing as a positive, famous, well-rounded national reputation, one that stimulates attention, respect, good relations and good business in every aspect of the country's international engagements. The fact of the matter is that no single national stakeholder – the tourist board, the investment promotion agency, the corporate sector, civil society, exporters, central government and so forth – is in control of all the factors that affect its business, so it is essential that they work together.

This is especially true of smaller countries, which, thanks to the rapid advance of globalisation, find themselves competing every day against countries with far greater resources. For a small country to stand any chance of making its voice heard in this huge global marketplace, it is absolutely essential that it fires on all cylinders, and that everything the country does, says and makes, somehow reinforces the same basic story, the same values, the same personality, the same tone of voice. It is only once a country really learns **how to be itself** that it can start to exert some influence over its international reputation, and to start to benefit properly from that asset.

About Competitive Identity

Once it is accepted that communication alone cannot alter a negative or outdated national image, the critical question becomes whether it is indeed possible to close up that gap by other means (assuming, of course, that the country in question does actually deserve a better reputation than it has). Hence the concept of Competitive Identity, a phrase I have coined in preference to the misleading term 'nation branding' to describe what is essentially a plan for mobilising the strategies, activities, investments, innovations and communications of as many national sectors as possible, both public and private, into a concerted drive to **prove** to the world that the nation deserves a different, broader and more positive image.

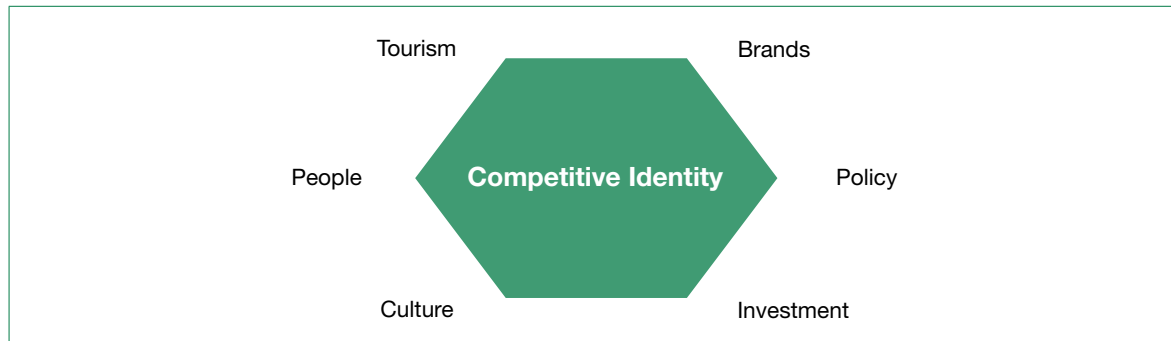
The theory of Competitive Identity takes its cue from the way in which country images are naturally formed. By accident more often than by design, most countries engage with the outside world, and so create their images, through six basic areas of activity:

1. Their tourism promotion, as well as people's first-hand experience of visiting the country as tourists or business travellers.
2. Their exported products and services, which act as powerful ambassadors for each country and region when their place of origin is explicit.
3. The policy decisions of the country's government, whether it is its foreign policy, which directly affects the 'audience', or domestic policy reported in the international media.
4. To business audiences, the way the country solicits inward investment, and recruitment of foreign entrepreneurs, workers, researchers and students.

5. Through cultural exchange, cultural exports and sport.
6. The people of the country themselves: politicians, media and sports stars as well as the population in general; how they behave when abroad and how they treat visitors to their country.

For clarity, these ‘natural’ channels of influence, communication or representation can be shown as the points of a hexagon:

Figure 1 The hexagon of Competitive Identity



Source: Simon Anholt (2002)

The basic theory of Competitive Identity states that improved coordination between the points of the hexagon, the joint development of a national strategy, more sharing of resources and expertise, the encouragement of innovation and the establishment of common standards and quality measures can achieve a great deal. Even a modest amount of such ‘joining up’ tends to result in a more effective management of national reputation than most countries currently achieve, or ever have done.

Why tourism matters

The main business of a tourist board is selling vacations, however, and vacations are products. Compared to the mysteries of national image, destination marketing is a relatively straightforward business: as long as the tourist board has enough marketing expertise, resources and patience, it can be fairly sure of increasing tourism arrivals.

Tourism has a secondary impact, however, which is less well recognised, and which makes it one of the few means by which the overall ‘brand image’ of a country **can** in fact be enhanced.

A pleasant holiday experience self-evidently has the power to change the ‘brand image’ of that country, quickly and possibly forever, in the mind of the holidaymaker. People often abandon their preconceptions about countries once they visit them: for those individuals at least, the country stops being a brand and becomes a real country. Indeed there is some evidence from the Nation Brand Index to show that preference for a country and its people, politics, culture and products tends to increase as a result of **any** personal experience of that country, even when the holiday experience is not positive.

This factor is significant, because people talk to other people about their holidays. If enough people visit the country, especially if they are an influential demographic, then over time this can create a measurable improvement in the country’s overall international image. And of course it is a virtuous circle: the better the image, the more people will want to visit the country.

So it follows that destination marketing, in addition to its primary purpose of encouraging visits, can play an important secondary role in helping visitors to form a compelling personal narrative about the country, which enhances their power as ‘viral agents’ or informal advocates for the country’s brand once they return home. The way in which the destination is marketed, the ‘brand story’ that it tells, is passed on by satisfied visitors to other prospects, and eventually becomes a powerful agent for widespread social marketing effects.

It is worth remembering when one is creating marketing messages that one is not simply engaging in a temporary monologue with a primary audience: one is also building a story which, if it is good enough, can take on a life of its own and circulate around the marketplace for a long time, building the brand and making further sales.

The challenges of destination branding

For this and for many other reasons, the integration of tourism and tourism promotion into the overall nation brand strategy is to be encouraged: but this integration brings real challenges.

The main challenge is about balanced representation of the country. Tourism is frequently the 'loudest voice' in communicating the country; the tourism sector often has the biggest marketing budgets and the most experienced marketers of any sector. This can, over many years, have the effect of drowning out the economic, political, industrial and even cultural voices, and creates a skewed, 'soft', leisure-oriented nation brand which conflicts with the country's reputation as an exporter of quality products, a serious political player, a technological power, or a suitable destination for investment.

One way of avoiding this trap is for tourist boards to ensure that they always take care to properly represent the reality of the country's population in their marketing. Empty landscapes, in any case, tend to be less effective images for tourism promotion since the cultural aspects of tourism are so important to travellers; and stereotyped representations of smiling natives in national dress are seldom very convincing. Tourism promotion that gives some sense of the real abilities and real activities of the population is likely to be more engaging, more convincing, more agreeable to the population itself (which is, after all, the 'product' which is being 'sold' and therefore has a large stake in the process), and is less likely to set up images of the country which will clash with its economic, political or industrial reality.

The second challenge is objectivity. Of all the qualities needed by those who are responsible for nurturing a country's image, objectivity is one of the most valuable, and one of the hardest to achieve. After all, Marketing Directors who are responsible for marketing a product are generally salaried employees, are seldom the inventor or manufacturer of the product, and so do not find it too difficult to take a cool, objective view of the brand they are building: indeed, good ones are valued precisely because of their ability to see the brand in the same way as the consumer.

But when the product doesn't come out of a factory, but is the homeland of the people trying to market it – where they and their parents were born, raised, schooled and trained – objectivity becomes an extremely elusive quality.

A lack of objectivity can be fatal to the image strategy of a country, no matter how good the intentions at the start. Typically, I find communications departments in ministries producing lists of their country's achievements and natural advantages: the nation's most distinguished sons and daughters, the role it has played in world events, its own major historical moments, gems of architecture and natural beauty, regional cuisine, language and folklore, all served up with pages of indigestible demographics and statistics about GDP and income per capita.

From the point of view of a busy consumer halfway across the world, of course, the historical achievements and natural advantages of most countries are of little interest, and seldom add up to anything that could be described as a coherent or powerful brand. Indeed, since Competitive Identity is most urgently needed by the smaller, poorer and newer countries, it is all the more likely that such facts will seem pretty unimpressive to the detached observer. On more than one occasion, I have been faced with the tricky task of gently explaining to a very proud and very patriotic minister that the world will not be enthralled by the fact that the world's first metal suspension bridge was invented by a man whose grandfather came from his country, or that over sixty different species of wild grass grow along his eastern coastline.

There is a real risk for smaller countries with limited achievements simply confirming the world's belief that they are a smaller country with limited achievements, by telling people about the handful of world-

class or nearly world-class assets they have, and of which they are greatly and perhaps justifiably proud. But the fact is that the potential tour operator or tourist is already comparing them with countries that are in a completely different league, and their expensive marketing will simply serve to emphasize the differences, to their own disadvantage.

Rather than attempt to measure themselves up against much bigger, richer or more successful countries, it is far better for countries to identify where their real genius lies, their unique abilities or potential that really do put them in a class of their own. This potential may well be the result of their small size, small population or small economy, not something that they manage to achieve despite it. All countries, if they look hard enough, will find something that is uniquely theirs, and inherently competitive.

The ability to see one's own country, its people, its achievements and its landscape through the eyes of an indifferent consumer on the other side of the world, through the complex lenses and filters of an entirely different culture, is an indispensable skill for all those involved in promoting the nation. Proper consumer research and communications testing is one facet of this, but unless the research findings are fully 'internalised' by marketers and become part of their own perspective, they are unlikely to create real objectivity.

Dealing with negative reputation

A problem often faced by countries in our security-obsessed age is knowing how to deal with a negative national reputation. The problem is that stories about war, terrorism, poverty, disease, corruption, crime and violence – whether entirely justified or not – tend to spread very rapidly, to be instantly believed, and to last for a very long time, playing havoc with a country's tourism promotion efforts.

If we want people to change from the story they currently believe about a country, we have to give credit to their attachment to that story. As I have often said, they are very warmly attached to it: it is simple, credible, and functional, and it has helped them reduce the complexity of a global world, possibly for decades. They believe it because it works, and because it is interesting. Unfortunately, negative or shocking stories are very often more interesting than good or positive or pleasant stories.

But there is simply no point in expecting people to trade down voluntarily from this 'bad' narrative to a 'good' one that's less interesting. The significant factor to bear in mind when attempting to correct a negative reputation, therefore, is not whether the story we are telling suits our purposes better, or even whether it is more true than what people already believe: all that matters is whether it is **more interesting** and **more relevant** than what they already believe. Unless it is, they simply will not transfer their interest, and will continue to believe what they have always believed.

Tourist boards can not and should not ignore negative national reputation. It is essential that any areas of negative reputation are fully researched and fully understood before they are allowed to influence a country's marketing plans: this may sound like an obvious point, but it is surprising how many countries and their tourist boards will react to what they **believe** is a negative perception without first establishing the nature, the extent and the causes of that reputation in a rigorous and robust way.

Proper benchmarking, accountability, transparency and clear goals for marketing are equally essential: all the parties involved need to agree on what constitutes a successful outcome for any marketing or 'branding' plan, and to agree on how this outcome will be measured. This is only proper, given that it is usually taxpayer or donor funds that are spent on such initiatives.

Dealing with negative reputation is a matter of treading a careful line between tacitly acknowledging the problems (which if overdone can raise the profile of those problems to people who weren't worried about them, or even introduce them to people who didn't know about them), and appearing to ignore or even lie about them.

Obviously, marketing communications is not the right medium for addressing issues such as security, foreign policy or human rights, and neither is the tourist board the right body to comment on such things. This is simply another example of how important it is for all sectors to work together when

national image is at stake: policy makers need to address the problems directly (tackling the negative) while tourism shows that the country is still in business and still a viable destination (emphasizing the positive). Support from the culture and business sectors can be very helpful in establishing the positive side to the national 'story'.

Business travel

The question of non-leisure visits, or what is sometimes called the meetings industry, is worth singling out for particular emphasis in this context.

As leisure and even cultural tourism tend to be seasonal in nature, and as the natural or climatic attractions of many countries do not enable them to compete at a truly global level, it is essential that the business side of tourism is developed to the highest possible standard. Business visitors, as is well known, tend to bring many more 'knock-on benefits' than leisure visitors: not only do they spend more money than tourists on subsistence and accommodation and transport, but they also bring influence and connections, which can lead directly or indirectly to academic, financial, commercial, sporting, cultural and political investment for the city.

However, the meetings industry is quite different in nature to leisure tourism, and one should not make the mistake of conflating the two: apart from anything else, the fact that one involves consumer marketing while the other is strictly B2B means that they should be handled in quite different ways, by different people, and with separate budgets.

The environment

A final, crucial point concerns the environment, a subject which increasingly dominates the agenda of the tourism industry.

An interesting finding which has come out of the Nation Brands Index is how consumer tastes and values appear to change somewhat faster than national image and reputation. As I have often said, country images really do not change very much; people need these comforting stereotypes that enable them to put countries in convenient pigeon-holes, and only abandon them if they really have no other choice.

People's views of global issues, on the other hand, change much more rapidly. National images move slowly because most people spend so little time thinking about other countries: if a person in Canada or South Africa or India spends a few moments each year thinking about Italy or Chile or Japan, it is not surprising if their perception of those countries remains largely unchanged for years on end. But on the other hand, people in Canada and South Africa and India may spend several minutes every **day** thinking about big issues like climate change, poverty, war and diseases, religion, the cost of living, oil prices and whatever else is in the media, so public opinion on these topics changes relatively fast and relatively frequently.

So it follows that a country's image is more likely to be affected by a change in the relevance of its image for its target audience – in other words, to go out of fashion – than by an inherent loss of attraction in that image. Judging by the profiles of the countries that most people now admire, three areas of reputation have become critical in recent years:

1. A country's perceived **environmental** credentials. This is rapidly becoming a mandatory requirement for a country's acceptance into the community of nations, and a critical factor in the decision-making process of tourists, consumers and others.
2. A country's perceived competence and productivity in **technology**, which is a proxy for modernity: people, on the whole, admire modern countries.
3. A country's attractiveness as a place of learning and economic and cultural **self-improvement**: a destination for personal advancement.

It is clear that the first of these areas is of particular concern to the tourist industry. Basic levels of environmental awareness and protection are increasingly seen by consumers as the 'cost of entry' into the marketplace, and there is no longer anything very special about countries that offer 'green' vacations and talk loudly about their commitment to protecting their natural environment.

As time passes, it becomes increasingly necessary for countries to show real innovation, real action, real leadership and above all demonstrable results in this area. 'Greenwash' just will not wash, and as in every aspect of the fascinating field of national image and reputation, actions will always speak louder than words.

In fact, if destination marketers only remember one piece of advice, it had better be this. Do not think about what to say next; think about what to **do**.

Executive Summary

Brand definition

- The term 'brand' is often misunderstood. The term 'destination brand' is used throughout this Handbook to refer to a destination's **competitive identity**. It is what makes a destination distinctive and memorable. It differentiates the destination from all others. It is the foundation of the destination's international competitiveness.
- A destination brand represents the **core essence and enduring characteristics** of a destination. A destination can change its moods and the way in which it presents itself to different market segments. But its core brand characteristics, like someone's personality, are essentially always the same.
- A destination brand is the **DNA** that defines the destination. It should run through **every act of marketing communication and behaviour** by the NTO and the destination's stakeholders.
- A destination brand represents a **dynamic interaction** between the destination's core assets and the way in which potential visitors perceive them. It really only exists in the eyes of others. It is the sum of their perceptions, feelings and attitudes towards the destination, based on the way in which they have experienced the destination or on how it has presented itself to them.
- A destination brand generally cannot be manufactured like a consumer product brand. It inherits its core assets: its landscape, people, culture and history. It exists in the way in which these assets are perceived by potential visitors and the **emotional value** they attach to experiencing them.

Brand development process

- **Branding is for everyone.** It is not the preserve of high-spending destinations. All destinations can, and should, develop a brand, regardless of the size of their marketing budgets. Destination brand values should run through all marketing communications, whether simple website pages, public relations messages or expensive TV advertising.
- A destination should focus on its **core market segments** when developing a brand. Their perceptions will define the brand's core characteristics. It is therefore essential to understand how they perceive the destination through targeted consumer research.
- **Qualitative research** is the most effective way to identify consumer perceptions of the destination. People's psychological needs and travel motivation must be explored in sufficient depth to reveal their true motivation for travel, identify the experiences they are seeking, and to understand what kind of destination would satisfy them. This requires much deeper psychological investigation than merely establishing visitors' 'likes' and 'dislikes'.
- **Stakeholders** (e.g. political, commercial, travel businesses and residents) should be involved from the outset in developing the brand. This is the best way to obtain their buy-in to the concept, as well as secure their active participation as advocates of the brand in how they talk about the destination and how they behave towards visitors. This can also reinforce national/civic pride amongst residents.
- A **fine balance** is required to enable the **creative flexibility** necessary to appeal to different market segments while still maintaining a coherent destination brand that is universally recognisable.

- Destination brands can be **geographically-based, thematic or a mixture of both**.
- Attempting to build **supra-national and pan-regional brands** generally does not work very well. They tend to lack cohesiveness, involve too many stories and too many stakeholders. This generally doesn't add up to a sufficiently clear competitive identity or to a strong impact on potential visitors. Nevertheless, pan-regional **marketing** cooperation can achieve economies of scale for destinations that are targeting the same markets.
- National and sub-national brands should share a **brand architecture**: sub-national brands should reflect at least some of the national 'umbrella' brand values while still differentiating themselves from each other.
- Nevertheless, **flexibility** is required to enable sub-national destinations to develop and promote their own brand identities in competition with each other where appropriate, rather than forcing them to become a pale imitation of the national brand.
- The **best opportunity for sub-national brands** often lies within national brand marketing materials (e.g. websites, brochures, consumer shows, and trade fairs). Sub-national brands can take advantage of the market penetration and distribution achieved by the national brand to present their own sub-national brand messages at the point at which the consumer (or trade customer) is most likely to be receptive to these messages. The national brand creates an opportunity for the sub-national brand to reach markets it could not otherwise afford to reach; and the sub-national brand adds value to the national brand by providing more texture on the national destination that adds to its appeal.
- A destination brand usually comprises several different and complementary values that define its personality. These do not all always need to be used in every marketing communication in equal measure. They can be applied selectively and their prominence '**dialled up or down**' like the volume, bass and treble of a music system, according to their appeal to different market segments. The important thing is that the resultant marketing communication still feels as if it comes from the same place by reflecting some of the destination's brand values.
- Destinations tend to **refresh their brands**, more often than radically re-brand, because they are mostly unable to alter their basic product, which is inherited (e.g. people, culture, history, landscape).
- It is time to consider refreshing a destination brand when it becomes **comfortably familiar**. This usually presages its likely decline from being familiar to becoming fatigued and losing impact amongst potential visitors.
- There are a number of models available for teasing out the 'truth' of a brand. The roles of all **brand-building models** are similar in that they aim to establish the brand's core essence, however this is described. It is therefore a matter of personal choice as to which one to use.
- Building a destination brand requires **answers to the following questions** on behalf of potential visitors:
 - What are the main things I like about the destination?
 - What sort of place is it?
 - How does it make me feel?
 - How would I describe it in one sentence?
 - What makes it different from all other destinations?
- **Specialist branding and research agencies** can help destinations develop their brand by providing independent, experienced analysis, which is essential to underpin a sustainable destination brand.

Brand implementation, management and monitoring

- Once the destination's brand essence and values have been established, they should then be **run through all marketing activities** by the NTO and, ideally, by stakeholders in their own marketing communications. This means reflecting the brand essence, through the projection of appropriate brand values, in every single marketing communication, no matter how small.
- Projecting a destination's true essence with real impact in marketing communications relies on **clever, creative execution**.
- A high level **steering group** is valuable for developing the brand and monitoring its progress. This sends signals that the brand is considered important by senior people. This can make it easier to obtain buy-in from important stakeholders and opinion-formers within the destination.
- A **brand guardian/brand manager** should be appointed who has a direct link to the NTO chief executive.
- A modest number of high profile **brand champions** should be appointed to espouse and promote the brand amongst stakeholder groups in different economic, political and community sectors. These should be people who are leaders in their field and are able to command respect across a wide range of sectors.
- **Brand advocates** should be recruited throughout as many stakeholder organizations as possible. They are generally people who hold positions of influence in relevant organizations, who can therefore ensure that the brand is adopted within their own organizations.
- Brand champions and brand advocates need to be well-informed about the brand and well-equipped to champion it. This usually involves **training** them in the principles and application of the brand. They need to be provided with key facts and information about the brand, so that they can promote it knowledgeably and convincingly.
- An **internal marketing programme** should be developed for NTO staff and key stakeholders. This should explain what the brand is, why it is important, and how to implement it. They must also be kept up to date with any feedback on, and changes to, the brand.
- The **NTO needs to live the brand** within its own internal culture.
- A **brand toolkit** should be produced for NTO staff and stakeholders. This should explain: the role of a brand; the destination's brand essence and values; and how to apply them in marketing communications. It should also contain technical guidelines on using any brand logo or brand identity. This should be available in electronic format, ideally via the NTO website.
- **Residents** need to be brought on board too. They should be informed about the nature, value and purpose of the brand, which is in effect representing them both nationally and internationally. This can be done through presentations, discussion groups, and media communications.
- The **brand's impact should be regularly monitored** and, if necessary, refined. This is best done through brand-tracking surveys, on-line panel surveys, 'Omnibus'-style surveys, consumer research, visitor satisfaction surveys and benchmarking surveys.
- The brand manager needs to be alert for sign that the brand might be getting tired and in need of **refreshment**. Brand-tracking surveys and media monitoring will usually provide the first early warning signs of a brand's decline.

Critical success factors

Critical success factors in developing a successful brand are:

- A good understanding of the destination's **core market segments**.
- **Qualitative consumer research** to understand people's deep motivation for travel and their feelings and attitudes towards the destination, not just their likes and dislikes.
- A clear understanding of the destination's **competitive position**, its relative strengths and weaknesses.
- **Leadership** and support for the brand from the very top (e.g. NTO CEO and ideally from government as well – tourism minister, prime minister or president), that is both enthusiastic and highly visible.
- A robust brand management system that includes an energetic **brand manager/guardian**, influential **brand champions** and committed **brand advocates**.
- An **internal brand communications programme** that inspires commitment to the brand amongst NTO staff.
- Destination **stakeholders' buy-in** to the brand through their involvement in developing the brand from the outset.
- **Ongoing communication with stakeholders as involved participants**, not as external observers.
- **Adoption of the brand** by commercial and other destination stakeholders in their own marketing communications – thereby stretching the brand's impact.
- Constant **monitoring of the brand's impact** and relevance amongst key target segments.
- An understanding throughout the NTO that **everyone is responsible** for applying the brand in marketing communications and behaviour, not just the brand manager.
- **Long-term commitment** to enable sufficient brand equity to be built up for the brand to gain traction in the marketplace.
- A **mindset** within the NTO that positions the brand at the centre of all marketing communications.
- **Living the brand:** A brand is not just about marketing communications; behaviour is critical – by the NTO and its staff, by stakeholders, and by residents (i.e. everyone with whom the visitor comes into contact, whether face-to-face or as a recipient of information, service or products provided by anyone in the destination). Behaviour – as in the way that visitors experience a destination through the people they encounter – has always been the most important element of a destination brand. In the Web 2.0 environment, where people can 'Twitter' and exchange immediate views on both good and bad destination experiences, brand-compliant behaviour, or at least behaviour that reinforces rather than contradicts the core brand essence, will become even more critical to a destination's image.

The future

- Destinations around the world will increasingly recognise the importance of their brand as the **source of their international competitiveness**. Those that do not clearly understand, articulate and apply their brand essence and values in marketing communications and behaviour will fall behind their competitors.

- **Place branding will become increasingly important, and valuable.** Destinations will have to develop partnerships with other sectors to project an overall, holistic place brand, as part of an overall national, regional or city effort to project it as somewhere attractive to live, work, study, invest, visit and do business. But they will still need to apply their own distinctive destination brand when talking directly to potential visitors.
- NTOs need to find ways of remaining relevant and useful to potential visitors in the **digital era**. The Web 2.0 environment requires a change of mindset in the ways NTOs approach their marketing communications. But the role of the brand – as a consistent representation of the destination's brand essence – remains the same. It is, if anything more important, amongst the welter of ungraded information available on-line from limitless sources.

Introduction

“Any damn fool can put on a deal, but it takes genius, faith and perseverance to create a brand.”

David Ogilvy, *The Father of Advertising*, 1911-1999

“You do not change people’s perceptions of a country with advertising. You change people’s perceptions by finding the truth, finding an idea that embraces that truth and putting it through everything they do.”¹

Wally Olins

Purpose of this handbook

This Handbook aims to provide **useful and practical reference** material for destination managers that will equip and inspire them in branding their destinations. In doing so, it also aims to demystify the concept of destination branding and to explain the value of branding a destination. It uses case studies and examples in an attempt to bring the principles of destination branding to life.

This Handbook is aimed primarily at **National Tourism Administrations and Organizations (NTAs/ NTOs), as well as sub-national destination and city marketing organizations (DMOs)** – in fact anyone who is responsible for managing the reputation of their destination and attracting visitors.

It recognises the need to be relevant both to **marketing novices and to experienced destination managers**. As well as helping those who are new to destination branding to understand the basic principles, it aims to provide fresh insights for experienced brand managers.

In commissioning this Handbook, ETC/UNWTO set a number of **specific objectives**. It should:

- be practical, user-friendly and accessible;
- inspire the implementation of, or improvement in, existing methods and uses of effective destination branding by destination managers;
- present objectives, approaches, techniques and data requirements of relevance for destination branding;
- empower NTO/NTA/DMO staff with superior knowledge to enable them to initiate and oversee a successful destination branding strategy.

It should be stressed that this Handbook is not an academic textbook. It is a **practical guide for destination branding practitioners**. It does not aim to be either comprehensive or prescriptive. Examples are necessarily highly selective and have been chosen for their ability to illustrate a particular point and provide useful insights for destination managers. It therefore seeks to combine intellectual rigour and good practice insights in a document that is of practical value, easily digestible, and of an acceptable length.

It is also designed to be **accessible for those who wish to use it selectively as a reference document**, dipping in and out to check various bits of information at different stages of brand development. For this

¹ Olins, W. (September 2007), interview in *Monocle Magazine*, pp. 60-61 (Wally Olins, Chairman, Saffron Brand Consultants).

reason some information is replicated in different sections, where it is relevant. This aims to serve the reader who only wishes to consult a particular section by including information where he/she would expect to find it, rather than having to trawl through the Handbook for it.

A list of **further reading** on destination branding (both academic and business publications) is appended in the Bibliography at the end of the Handbook.

The **value of this Handbook** will be measured by the reaction of readers, particularly amongst ETC and UNWTO members. If it can inspire those who are new to the concept of destination branding to embark with confidence on developing a destination branding strategy, as well as provide fresh insights to destination branding experts that they find helpful in their work, then it will have achieved what it set out to do.

A word on the essay *Why National Image Matters* and its link to the rest of the handbook

Simon Anholt's Essay, which introduces this Handbook, usefully and controversially frames the debate about destination branding. It pulls no punches about the misconceptions and erroneous assumptions that are often held about country branding. Before addressing the role of destination branding in depth, it is therefore worth explaining what might, at first glance, appear to be contradictory perspectives between Anholt's essay and the main content of this Handbook.

Rather than undermining the argument for destination branding that comprises the main part of this Handbook, Anholt's healthy scepticism about the approach that countries often adopt to branding is instructive. While Anholt expresses doubt about the possibility of 'doing branding' to a country, this is a valuable caveat that highlights the futility of attempting to brand a country in isolation from other stakeholders. It also leads to Anholt's argument for the more robust term 'competitive identity' and all that this concept entails. We have chosen to treat the terms 'brand' and 'competitive identity' as synonymous throughout this Handbook, as this is what we believe lies at the core of the role of a brand. While we interpret both as meaning the same thing, we have retained the term 'brand' throughout as this is more widely used and recognised internationally. We explain that the role of a brand is to establish a destination's competitive identity.

Anholt helpfully identifies the mindset that can result in nation-branding failure. He outlines critical success factors that need to be understood in order to begin establishing a country's competitive identity. These are entirely consistent with the advice that follows in this Handbook. His main points are:

- **Marketing communications alone cannot change a country's image.** They need to be backed by substance, such as an obvious and credible demonstration of 'brand-compliant' behaviour, physical infrastructure, and service provision. People's perceptions of a country will be formed primarily by personal experience and word-of-mouth communication from trusted sources. Marketing communications can merely highlight the country's positive features.
- **Destination branding alone cannot change a nation's image.** There are many other factors – other sectors, sources of information and people – that contribute to the way in which a nation is perceived. Destination branding can, however, play a major part, as tourism is often the 'loudest' of all the voices that talk about the country externally.
- **No single national stakeholder has control over all of the factors that affect a country's reputation.** Partnership between stakeholders in all sectors is therefore essential – in business, civil society, exports, cultural organizations, central and local government. They all need to convey a similarly positive image of the nation and to do so consistently.
- **A country inherits most of its strongest assets** (e.g. people, history, culture, landscape). It needs to build on these, refine them where appropriate and practicable, add to them if credibility and authenticity can be retained, and project them positively and consistently in a way that appeals to those who would appreciate them.

- **Changing a country's image for the better takes many years**, sometimes generations, depending on the strength (positive or negative) of its current image. People will only begin to change their perceptions if they see credible and consistent evidence of physical, cultural and attitudinal change. Marketing communications can be used to draw people's attention to the fact that change is taking place, although this will only be credible if it is backed by evidence that change has already begun.
- **Marketing communications are a blunt instrument for conveying a country's image**, when considered within a global context over several years. But, when the destination product and the way in which it is presented are in harmony, and when different stakeholders work together across all sectors, there is a real chance of making a difference in terms of the country's international image.

These are all instructive caveats that set the backdrop against which a destination brand can be developed. They set the destination brand within the context of a country's overall image, which the destination brand helps form and from which it can also leverage value. Clearly an **overall** national image that is positive can make the job of marketing the destination easier, and more difficult if it is negative. But can a **destination** brand really make a difference to a country's tourism economy?

In the more specific arena of tourism, as opposed to the overall economic arena, the image of a destination has more chance to alter the image of the country than in most other sectors. This is because the destination talks to a much smaller and more precisely defined target group than the country as a whole does: people with a potential interest in visiting, whose focus is primarily on the holiday experience the destination offers them. If a destination can identify its main appeals that make it stand out in the eyes of its target markets and project the essence of these appeals consistently to them, it has the basis for an effective competitive identity, or destination brand. And, this gives it a powerful weapon for attracting visitors in competition with other destinations.

This is not to deny that it still takes time to change people's perceptions of a destination, or to belittle the values of a country's overall image. But it does imply that a clear-sighted understanding of its competitive identity from a visitor perspective, and a persistent focus on its core target markets, will enable a destination to establish a reputation amongst those who will find it most appealing to visit. And at this level a destination brand, projected through clever, creative marketing, most certainly can make a difference.

This Handbook pursues the argument that a destination brand is a powerful and fundamental tool that can:

- help destinations compete more effectively for visitors;
- assist in the projection of a country's, a city's, or a region's overall image;
- occasionally help transform the image of a country, a city or a region.

This argument is consistent with Anholt's, as expressed in his essay above. The dramatic transformation that has taken place within the last five to twenty years in the images of Spain, New Zealand, Northern Ireland, Colombia and Glasgow is clear testament to the power of branding backed by substantive change. A concerted branding approach can make a difference over time. The image of these places as destinations played a significant, but not exclusive, part in their transformation.

The process of destination branding is therefore seen as not just worthwhile, but as a fundamental step in projecting, maintaining, and even changing a country's image – firstly as a place to visit, but also indirectly as a place in which to live, work, study, invest and do business.

Destination brand managers would therefore be well-advised to heed the caveats and critical success factors outlined in Anholt's essay when embarking on the development of a destination branding strategy. Otherwise it is likely to fail. Destination branding does work; but it is not a quick fix. Best results will be achieved if tourism authorities and businesses work in partnership with other sectors to promote a consistent image of the country. This must be based on real substance. However, it is recognised that

this type of partnership, while desirable, is not always achievable. The first step for destination brand managers is to focus on getting the destination brand right.

Anholt's essay has set the ideal context. The core of this Handbook, which follows, is devoted to explaining how to do this at the destination level, although the linkage between destination and 'place' (referring to all sectors, not just tourism) is discussed in relation to the future of destination branding.

'Doing branding' to a country is therefore a worthwhile, and indeed fundamental, exercise. But it has to be done honestly, consistently, and in harmony with the country's stakeholders for it to be effective. It is about identifying, promoting and nurturing the country's key assets, and the qualities that underpin them. And it takes time.

Handbook overview

Tourism has become one of the world's fastest growing sectors in recent years. Governments around the world are increasingly recognising the power of tourism to boost their nation's economic development and prosperity. Competition for visitors has become ever more intense. More countries are emerging as tourism destinations each year. New destinations have emerged from previously closed or repressive regimes; developing countries are increasingly investing in tourism. And these new competitors are obliging traditional tourism destinations to continually refresh their appeal. Finding ways of standing out from the crowd has become ever more important in the competition to attract potential visitors' attention. And in a busy world, with more destinations to choose from, people have less time to absorb complicated messages about a destination, particularly if the destination is unknown to them.

It has therefore never been more important for a destination to establish and nurture its competitive identity, or brand. This is what makes a destination distinctive and memorable. The brand lies at the core of a destination's ability to project itself on the world stage, differentiate itself from others, and thereby compete effectively for visitors.

There is much confusion surrounding the term 'brand', and there are variable levels of understanding as to how to develop and implement a branding strategy. Consequently the European Travel Council (ETC) and World Tourism Organization (UNWTO) commissioned this Handbook to aid understanding and provide guidance on the branding process for tourism destinations around the world.

- This Handbook begins by defining what is meant by a destination brand and assessing its role and value as a **competitive identity**.
- It looks at the shift taking place from pure destination branding, which has been restricted to the tourism sector, to **place or nation branding**, which encompasses a much broader sweep of economic development.
- It compares **different types of brand** and identifies what destinations can learn from commercial brand marketing techniques.
- It illustrates **good branding practice** and draws lessons from case studies from around the world.
- Its main content is a **step-by-step guide** to the branding process, which explains how to develop a destination brand and bring it to life through effective marketing, appropriate behaviour and good management.
- It assesses various methods of **evaluating brand impact**.
- The Handbook concludes with a list of **critical success factors** and a set of **recommendations** for NTO brand managers.

The annexes contain:

- **Annex 1:** An overview of **current NTO branding practice**, based on a survey undertaken amongst ETC and UNWTO members in 2008, which provides an insight into branding trends, how NTOs interpret the concept of branding and how they apply it. It also identifies which destinations are most respected by NTOs for their branding practice.
- **Annex 2:** A **glossary of terms**, which clarifies branding terminology and seeks to further remove the mystique of what is a relatively simple concept.

A bibliography, which points anyone who is interested to useful further reading on the subject of destination branding, is found at the end of the Handbook.

What is it all about?

Standing out from the crowd, and standing **for** something, has never been more important for destinations attempting to attract visitors in today's increasingly crowded market place. Relying on product or price alone to sell a holiday is a recipe for short-term gain and long-term decline. Destinations need to build awareness, understanding and loyalty to compete and survive. In the frenetically paced world in which most travellers live, positive awareness of a destination is essential if that destination is even to make it on to the potential traveller's shortlist. If they aren't aware of the destination it will have no chance. If they have a negative view of the destination, for whatever reason, the destination's chances of changing this view are slight. If the destination does make it on to the traveller's shortlist, it will still have to compete with other destinations offering similar experiences. Only when it has made it on to that shortlist will it have any chance of competing for business. Making it on to that shortlist and finding a way to stand out from competitors is the goal of all tourism destinations.

People choose destinations for a variety of very different reasons. With the growth in demand for 'experiential' holidays, the experience initially defines the shortlist of destinations rather than the destination itself (e.g. sailing, climbing, wildlife-viewing, hiking, painting, cookery courses, exploring new places and cultures). As well as providing the physical product people are seeking (e.g. beach, culture, watersports, hiking, etc.), destinations increasingly need to satisfy travellers' emotional needs. People are looking to establish an emotional connection with a destination. Whether that is obtained through familiarity, adventure, learning new skills or achieving new insights, they are looking for experiences that lead to a sense of personal fulfilment. This is a change from the traditional approach to deciding on a holiday destination, which was characterised more by a focus on the destination's physical assets (e.g. scenery, beach, attractions, etc.). But this shouldn't fool us into thinking that the image of the destination is not important. The image of a destination – whether it is perceived as an attractive or unappealing place – can contribute towards it making the shortlist or not. And, once a shortlist of destinations offering these experiences has been drawn up, the traveller's decision is likely to be influenced by his/her perceptions of the place, particularly if he/she has never visited it before. This is where the destination's 'sense of place' kicks in. People then start to make decisions according to how they **feel** about the place.

A 'sense of place' is what makes somewhere distinctive and memorable. It is its personality. This is where its competitive edge lies. Establishing a sense of place involves celebrating the place's people, products, culture and heritage, nurturing its natural and built environment, and presenting the public realm in a way that reflects the true spirit of the place – from the management of public buildings to public art and events. It is, above all about appealing to people's emotional response to the place, rather than just talking about its physical assets. The ability of a place to inspire an emotional resonance with people is key to its distinctive character – whether they have been there or merely see it as an aspirational destination they'd like to visit one day. And being distinctive and memorable raises the chances of a destination making it on to the traveller's shortlist.

This is where a strong destination brand, or competitive identity, can make the difference.

A destination's competitive identity is the identity that makes the destination unique and enables it to stand out above its competitors by virtue of its inherent appeal being stronger than its competitors' in its main markets. As identified above, the terms 'competitive identity' and 'brand' are used synonymously throughout this Handbook. Establishing what makes a destination different and thereby endows it with a competitive advantage – its competitive identity or brand identity – in the eyes of its main markets is the foundation stone of all destination branding.

This should be the starting point for all destination managers, because, without a clear brand to work with, they will always be on the back foot and risk selling a 'me too' destination that fails to differentiate itself from others or inspire potential visitors.

All destinations have a brand image, whether they like it or not: in terms of the way that the world sees them, regardless of any activity by the NTO. Sometimes this can be out of date, as perceptions often lag behind reality when a place changes.

For example:

- **Bosnia's** image may still be blighted by war, even though this no longer defines the country's contemporary reality as a cultural and scenically attractive, mountainous tourism destination.
- Similarly, in some markets **Nice** suffers a hangover from its 'belle époque' era, when it was perceived as the playground of Europe's rich and dominated by the beach – an image that is out of kilter with today's reality of a vibrant, artistic centre, at the foothills of the Maritime Alps, whose character is as much formed by the adventure activities on offer in its mountainous hinterland as it is by the sea.

It is therefore up to the destination or brand manager to try to influence people's perceptions of the destination by establishing the true core of the destination brand. This should then be conveyed consistently in marketing communications by all who talk about the destination (e.g. NTO and all other stakeholders), so that its strengths are consistently and credibly projected to overcome any misperceptions about the destination based on historic memory rather than contemporary reality.

The brand is a destination's DNA. It defines the destination and should run through everything the destination does. It inherently answers the following implicit questions in the potential visitor's mind:

- What kind of place is it?
- What makes it different from everywhere else?
- Will I like it?
- How will it make me feel?

Identifying what makes a destination different and distinctive is the first step in putting it on the map. Paying attention to all the factors that build the destination's competitive identity will give it a competitive edge and make it stand out. The destination brand sums up what makes the destination different – and appealing – from everywhere else. It is far more than just a logo; it is the very essence or spirit of the place, which exists nowhere else. In short, when destinations get it right, it is the way in which people describe the destination to those who have never been there – a clear, succinct summary of its personality, which makes it stand out as somewhere worth visiting.

But while branding is increasingly being adopted as the foundation of a destination's competitiveness, considerable confusion surrounds the term 'brand', even amongst National Tourism Organizations (NTOs), National Tourism Administrations (NTAs) and Destination Management Organizations (DMOs)². This was evidenced by different interpretations of the term amongst different NTOs and NTAs

² For the sake of ease, the term NTO is used throughout this Handbook to refer to NTOs, NTAs and DMOs at national, sub-national and city level.

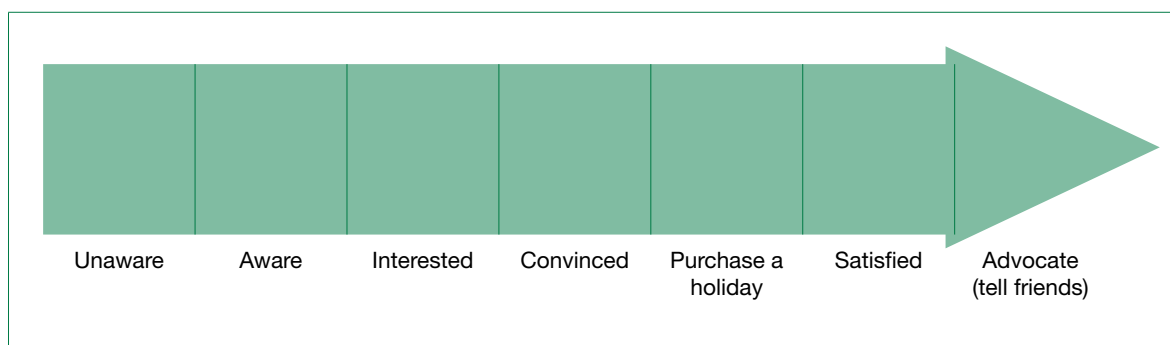
who completed a Brand Survey for this Handbook (see annex 1: *Survey of Current NTO Branding Practice*).

The ultimate aim of a destination brand is to ensure that people's experience of the destination – from the minute they are exposed to the destination's marketing material right up to their return home – is a positive one that encourages them to buy a holiday and return home as an advocate of the destination. It does this by enticing people with a marketing promise about what they will experience in the destination; and it guides the way in which the destination is presented to visitors when they get there – from immigration officials to hoteliers and guides. The visitor experience in the destination must match the expectations generated by the marketing: the delivery of the visitor experience and the marketing must both be 'brand-compliant' – meaning that they should reinforce the essence of the brand in visitors' eyes, or, at the very least, not contradict it.

A well-planned and executed branding strategy should move visitors along the brand continuum from being unaware to becoming aware of the destination, to expressing a preference for it, to buying a holiday, to becoming an advocate of the destination on their return home.

How the brand should affect visitor perceptions and behaviour in relation to a destination:

Figure 2 The brand continuum



Terminology

Annex 2 features a Glossary of Terms. However, a few of the more frequently used, and potentially confusing terms are explained here to establish clarity from the outset.

Country, nation, place and destination

- **Country** refers to the geographical entity. It is not used with any specific brand-related connotation.
- **Nation** refers to the sum of a country's economic, social and political activity. It is mostly used in this Handbook in relation to 'nation-branding'. 'Nation-branding' embraces the way a country projects itself in terms of its overall political, cultural and business image. This includes a tourism dimension.
- **Place** is used mostly in the same way as 'nation': in a holistic way that encompasses a country's, a region's or a city's overall political, cultural and business image. This also includes a tourism dimension. Where it is used in this way **place** is usually associated with the terms *place-branding* or *place-marketing*.

Otherwise, **place** is used with its regular, lay meaning to describe somewhere (e.g. a country, region or city) without any brand-related or other specific connotation.

The different uses of the term **place** should be clear from the context.

- **Destination** refers to a country, region or city specifically as a **tourism** destination – somewhere that wishes to attract visitors. It is quite specific and is not used in any other context.

Brand and competitive identity

- **Brand** and **competitive identity** are used synonymously throughout this Handbook.

They refer to a summation of a destination or place's characteristics that make it different and distinctive in the eyes of its potential visitors (or customers). This gives it a competitive edge, which makes it stand out from its competitors.

Competitive advantage and competitive edge

- **Competitive advantage** and **competitive edge** are also used synonymously throughout this Handbook.

They refer to the elements that differentiate one destination from another and help it stand out positively above its competitors in the eyes of its main target markets.

Branding, marketing and promotion

- **Branding** refers to the process of building a competitive identity, or brand, for a destination (or a place).
- **Marketing** covers the entire process of developing a product and promoting it to refining and redeveloping it – from initial consumer research through promotional campaigns to monitoring customer attitudes and sales. It is often misused in the tourism world to mean just promotion, which is merely one element of the marketing process.
- **Promotion** refers to the process of communicating a destination or a place's brand or competitive edge to potential visitors (or customers) through marketing communications. Promotion is just one element of **marketing**.

Market and segment

- **Market** and **segment** refer to a group of potential customers who have been identified as potentially interested in a particular product or destination.
- **Market** is most frequently used in this Handbook to refer to countries, although not exclusively; whereas **market segment** is used more frequently to define a group of potential customers who have been identified as potentially interested in a particular destination (see ETC/UNWTO *Handbook on Tourism Market Segmentation*).

Branding Explained

1.1 The Global Context

1.1.1 Global Tourism Trends

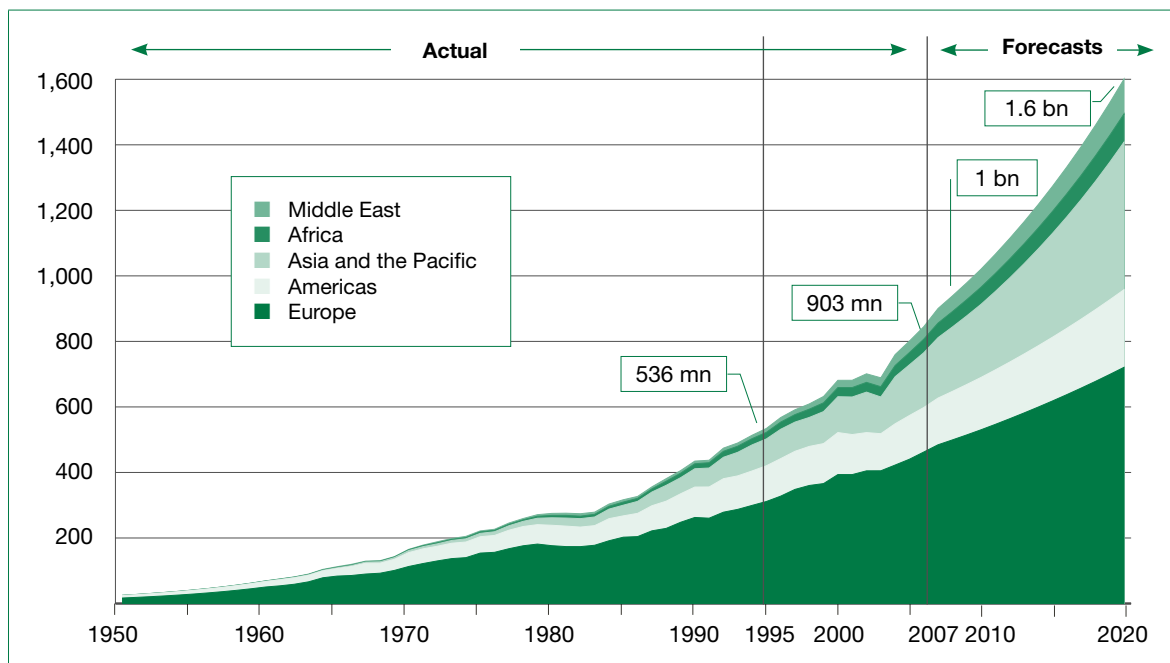
- According to the World Tourism Organization (UNWTO), **international tourist arrivals expanded by 7% in 2007**, to 903 million international tourist arrivals, compared to 2006.¹

Of the additional 52 million worldwide arrivals, Europe received some 19 million and Asia and the Pacific, 17 million. The Americas were up by around six million, Africa by three million and the Middle East by five million.

All these regions registered increases above their long-term average, with the Middle East leading the regional growth ranking (+13%), followed by Asia and the Pacific (+10%), Africa (+8%), the Americas (+5%) and Europe (+4%).

While trends vary at the level of specific countries, **Europe, Asia and the Pacific, and North America** currently provide the bulk of the world's outbound tourists (see figure 1.1). However the rapid percentage growth of the large developing economies of the BRIC countries (**Brazil, Russia, India and China**) is predicted to change the traditional patterns of global tourism and increase the total volume of travellers.

Figure 1.1 International tourism, 1950-2020



Source: World Tourism Organization, 2008

1 World Tourism Organization (June 2008), *UNWTO World Tourism Barometer* (Online), 6 (2), available: <http://www.unwto.org/facts/menu.html> (31-03-2009).

1.1.2 Travel Motivation

Travel motivation – Key points

- People in the larger, more established source markets are increasingly seeing themselves as **‘travellers’, rather than ‘tourists’**. They are looking for immersion in a culture, an understanding of the destination’s human and physical environment, and personal fulfilment from their holiday experience.
 - **Tourism is experiential:** The total experience of the holiday has become larger than the sum of its individual parts and travellers are looking for new sensations and unique experiences, even at established traditional destinations.
 - **Tourism is experimental:** Holidaymakers seek out adventure and “freedom from the limits imposed by things familiar and owned”².
 - **Tourism is existential:** Travellers are striving for purpose and self-realisation, whether indulging in sporting challenges, learning a new skill, participating in an exciting new activity, or just searching for personal space in natural surroundings and an emotional reconnection with their own soul or with their partner.
 - People are increasingly focusing on the **personally regenerating fulfilling power of a holiday**, and on the opportunity to reconnect with a partner and sometimes with the family.
 - People are increasingly seeking **escape, authenticity, emotional recharge and exploration**, rather than passive sightseeing or just relaxing on a beach.
- Social commentators often characterise the difference in travel motivation between travellers from the **‘old’ established markets** and the **‘new’ emerging markets** as a split between a search for spiritual³ and emotional refreshment and personal fulfilment in older established markets, such as western Europe, North America, Australasia and Japan and a more materialistic or hedonistic motivation in newer markets such as Russia, south and southeast Asia. This is a rather crude and simplistic characterisation, as there is a large swathe of people, particularly in northern Europe, whose holiday motivation is quite hedonistic, materialistic and more devoted to physical pleasure than spiritual refreshment (e.g. beach, sun and sea holidays). And there are equally travellers from the newer markets who are seeking a more spiritually fulfilling type of holiday.
- Nevertheless, the increasing search for spiritual refreshment and personal fulfilment is a significant motivation for travel amongst the more affluent and experienced holidaymakers from older established markets, who currently represent the largest and most potentially lucrative source of visitors for many destinations.
- Whereas, amongst travellers from newer markets that have only recently opened to travel (e.g. Russia, China) and other fast-growing economies (e.g. India, Brazil), the emphasis tends currently to be on visiting iconic cities (e.g. London, Paris, Rome, New York) and on ‘collecting’ destinations; and it tends to be characterised by relatively ostentatious consumption and purchase of well-known brands (particularly from Russia, Brazil and India).
- It remains to be seen whether travel patterns in these relatively young outbound markets will follow the experiential direction of the longer-established, more mature markets as they develop, or whether their travel motivations and destination preferences represent a deeper-rooted cultural preference that will remain as they are today.

2 Kuoni (2006), *Future of Leisure Travel – Trend Study*. An independent study created by the Gottlieb Duttweiler Institute on behalf of Kuoni, Switzerland.

3 The term ‘spiritual’ is not used here in any religious sense.

One of the big questions for the future is how travel motivations might change as more and more people travel from the newer economies: Where will the balance lie between the demand for spiritual refreshment, experiential travel and personal fulfilment versus the desire for off-the-shelf branded products, hedonistic holidays and manufactured vacation experiences?

- **Significant trends** amongst more affluent and educated travellers in the larger, longer-established tourism-producing countries include:
 - An increase in **long-haul travel**.
 - A propensity to take **more holidays**, but of shorter duration. People have been taking an increasing number of short breaks in addition to the main annual holiday, with some of this growth being fuelled by the growth in 'low cost' airlines, particularly within Europe. This is likely to shrink during recessionary times, but grow again in times of economic prosperity.
 - **Travel motivation** is becoming increasingly characterised by a search for escape, emotional recharge, authenticity, fulfilling experience, outdoor activities/adventure, and a general desire to participate and explore, rather than merely relax. In particular, there is a profound need to 'get away from it all' and to use travel and holidays for discovery of places, of cultures and of self.

Destinations are increasingly appealing to these motivations with their marketing messages:

- **Australia's** 2008-2009 *Walkabout* advertising campaign contrasts the frenetic pace of city business life with the regenerating potential of a holiday in Australia.

See: www.australia.com/campaigns/walkabout/UK/index.htm?ta_intcmp=en:UK:hphero:transformation

- **Slovenia** describes its 'I feel Slovenia' slogan as representing this power: "The harmony of senses with which you can feel the Slovenia green gives you energy at the end of a holiday and at the same time calms you down. A holiday in Slovenia restores balance, also owing to the fact that in Slovenia you are in touch with the elements..."^a

a) <http://www.eturbonews.com/353/trademark-slovenia-%E2%80%93-story-senses> (31-03-2009).

1.1.3 Technological Change

- **Changes in technology** are rapidly changing the way in which people access information on destinations, who they turn to for advice, and the way they book their holiday. The major influences are:
 - Growth in **internet penetration**: the number of people using the internet worldwide passed the 1 billion mark for the first time in December 2008.⁴ Asia Pacific was the most active region in overall numbers or (41%) followed by Europe (28%) and North America (18%).⁵
 - The Web 2.0 environment, and associated technologies, has greatly opened up opportunities for **personalised communication and social networking**. This has increased consumer power. A generation of marketing-literate, and often marketing-proof, consumers is more and more

4 European Travel Commission and comScore Internet Metrics Monitoring (2008), *New Media Watch* (Online), available: www.newmediatrendwatch.com/news/157-number-of-people-accessing-the-internet-has-surpassed-one-billion (31-03-2009).

5 Ibid.

turning to their peers and unknown commentators for credible comment and criticism of destinations and products they are considering visiting or buying.⁶

For example, TripAdvisor now features more than twenty million reviews,⁷ an opportunity that several commercial tourism businesses have recognised by linking their websites to TripAdvisor for potential customers to see independent reviews of their products.⁸ Their assessment of the risk of a few poor reviews is clearly outweighed by the prospect of many positive reviews.

- ‘Content is king’ was the mantra of the e-marketing pioneers. It is now established orthodoxy. **User-generated content** (UGC) has revolutionised the way in which destinations can recruit previous visitors as unpaid advocates by offering the opportunity for them to post comments, photographs and videos of their holiday experience on the NTO website or to link to other useful sites and to enter into an online dialogue with others about the destination. Far from being a threat, UGC has exponentially multiplied the marketing capacity for destinations around the world. This has been particularly beneficial for smaller destinations with limited budgets, who can now reach many more people in many more markets than ever before by offering such an opportunity for dialogue between previous and potential visitors.
- More importantly, the **Web 2.0** environment has changed the way people expect to do business and communicate with each other. It has transformed the relationship between sellers, buyers and browsers by empowering the potential customer and creating very different expectations amongst potential customers of the way in which businesses and service providers communicate with them.⁹

1.1.4 Competitive Environment

With sales of space tourism, the known world no longer defines the boundaries of competition for tourism destinations. However, on a more mundane level, more and more countries are emerging as tourism destinations each year. Some are opening up new areas for tourism, many are investing in developing new experiences for visitors, and others are appearing as genuinely new destinations, having emerged from crisis, conflicts or closed regimes. They see tourism as a significant opportunity to contribute to their national economic development. In the scramble for the tourist dollar, the tourism ‘product’ is continually being revamped to provide ever higher quality standards; imaginative ways of experiencing a country are being developed – from wildlife-viewing by balloon to staying with families in Brazilian *favelas* and African townships; and new experiences are continually being developed, from undersea hotels to participation in scientific expeditions, such as wildlife tagging or measuring coral depletion. The number of destinations is growing, and the choice of experiences is endless.

At one level, all destinations – whether worldly or extra-terrestrial – are competing for the traveller’s dollar. But this is self-evident. What is important, when branding and marketing a destination, is to identify which destinations are your destination’s closest competitors. This involves identifying what are the most important motivational factors that influence visitors’ choice of a destination such as yours and then to establish how your destination compares against your closest competitors. This is discussed further in section 2.4.7 *Competitor Analysis*.

Nature, culture, heritage and adventure are frequently cited by visitors as important elements in their ideal holiday destination. But most countries offer these in one form or another. Drilling down beyond the generic, identifying what truly motivates visitors and understanding what your destination offers that can match these visitor needs, is essential to identify your competitive position in relation to your

6 Boo.com (2008), ‘Online Reviews are more Trusted by the Public than the Opinions of Family, Friends or Travel Agents, According to a Boo.com Survey’ (Online), available: www.e-tid.com (31-03-2009).

7 TripAdvisor (2008) (Online), available: www.e-tid.com (31-03-2009).

8 Thomson (2009) (Online), available: www.thomson.co.uk/United_Kingdom/editorial/trip-advisor/trip-advisor.html (31-03-09) and EasyJet (2009) (Online), available: www.easyjethotels.com (31-03-2009).

9 For more information on Technology and Tourism, see ETC/UNWTO, *Handbook on E-marketing for Tourism Destinations*.

nearest rivals. This needs to be based on a clear understanding of different visitor segments and their motivation for travel (see ETC/UNWTO *Handbook on Tourism Market Segmentation*¹⁰).

So, in an increasingly competitive environment, it is essential to know what your competitive strengths are, to understand your different customers and to identify where your destination sits in relation to your nearest competitors. This is the starting point for identifying what makes your destination different and for establishing your competitive identity. And this is the basis for developing a brand strategy.

Figure 1.2 How top tourism-receiving destinations have changed over time

Rank	1950	World Share	1970	World Share	1980	World Share	1990	World Share	2007	World Share
1	United States of America	71%	Italy	43%	France	40%	France	39%	France	32%
2	Canada		Canada		United States of America		United States of America		Spain	
3	Italy		France		Spain		Spain		United States of America	
4	France		Spain		Italy		Italy		China	
5	Switzerland		United States of America		Austria		Austria		Italy	
6	Ireland	17%	Austria	22%	Mexico	20%	Mexico	18%	United Kingdom	13%
7	Austria		FR Germany		Canada		Germany		Germany	
8	Spain		Switzerland		United Kingdom		United Kingdom		Ukraine	
9	FR Germany		Yugoslavia		FR Germany		Canada		Turkey	
10	United Kingdom		United Kingdom		Belgium		China		Mexico	
11	Norway	9%	Hungary	10%	Switzerland	10%	Greece	9%	Malaysia	11%
12	Argentina		Former Czechoslovakia		Yugoslav SFR		Portugal		Austria	
13	Mexico		Belgium		Poland		Switzerland		Russian Federation	
14	Netherlands		Bulgaria		Former Czechoslovakia		Yugoslav SFR		Canada	
15	Denmark		Romania		Greece		Malaysia		Greece	
	Others	3%	Others	25%	Others	30%	Others	34%	Others	44%
Total	25 million		166 million		276 million		436 million		903 million	

Source: World Tourism Organization

10 European Travel Commission and World Tourism Organization (2007), *Handbook on Tourism Market Segmentation – Maximising Market Effectiveness*, UNWTO, Madrid.

1.2 Role: What a Brand Is and What It Is Not

“Countries should have a creative director. In 20 years’ time it will be standard practice for countries to have a government department looking after the country’s image: reputation management, tourism and foreign direct investment.”

Wally Olins¹¹

What is a brand?

Brand definition – Key points

- A brand is a **competitive identity**. It makes a product or destination distinctive and differentiates it from all others.
- A brand refers to the **essence**, or core characteristics, of a product or destination, which comprise its personality and make it distinctive and different from all its competitors.
- A brand is **not** a logo, a slogan, a product, or a marketing campaign.
- A brand **exists in the eyes of the beholder**: it is a dynamic relationship between the product and how it is perceived by potential customers and visitors.
- A brand is the **fundamental building block** from which all marketing communications and behaviour should flow.

Branding really is not rocket science. The term ‘brand’ causes confusion. It is used to mean different things by different people. It is important to understand what we are trying to achieve with a ‘brand’, more than it is to worry about the terminology. But first it is worth considering different definitions and clarifying how the term is used in this Handbook.

At one level a brand has a legal status and can be valued. But that has encouraged people to think of it as a physical product, which is not the most helpful definition, as it does not convey the power inherent in the role of a brand to influence people’s perceptions. This is a rather static and out-of-date definition favoured by fast-moving consumer goods (FMCG) manufacturers and advertising agencies in the 1960s and 1970s.

The American Marketing Association defines a brand quite legalistically and statically merely as a physical entity: “A name, term, design, symbol, or any other feature that identifies one seller’s good or service as distinct from those of other sellers. The legal term for brand is trademark. A brand may identify one item, a family of items, or all items of that seller. If used for the firm as a whole, the preferred term is trade name.”¹²

This is rather limiting and seems to be more applicable to a logo than to the qualities that differentiate one product from another, which the authors of this Handbook consider integral to the definition of a brand.

The United Kingdom Chartered Institute of Marketing goes beyond this static definition and links the product or service with the reaction it inspires in consumers: “The set of physical attributes of a product or service, together with the beliefs and expectations surrounding it – a unique combination which the name or logo of the product or service should evoke in the mind of the audience.”¹³

11 Wally Olins, co-founder of Wolff Olins international marketing agency.

12 American Marketing Association (2009) (Online), available: www.marketingpower.com/layouts/Dictionary (31-03-2009).

13 United Kingdom Chartered Institute of Marketing (2009) (Online), available: <http://www.cim.co.uk/MarketingGlossary/GlossaryHome.aspx> (31-03-2009).

This more dynamic definition is favoured in this Handbook. Current thinking includes the notion of a brand as a dynamic relationship between the product (or destination) and consumers (or potential visitors). Importantly the definition has shifted from being defined by the producer or manufacturer to being defined by the consumer. This means that a brand is much more about how the consumer (or potential visitor) perceives the product (or destination), not what the manufacturer produces or the products a country creates. It is about the promise of an experience that a potential visitor anticipates. It is therefore crucial for brand owners, or destinations, to understand their target audience, so that they can develop this dynamic relationship with their most valuable groups of consumers. And, unless the destination establishes an emotional relationship with its potential visitors, it will find it hard to gain a foothold in their imagination and project this promise convincingly.

This relationship with the customer is echoed by other commentators:

- "...the brand is the best psychological vehicle for delivering meaning".¹⁴
- "A successful brand is an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant, unique, (sustainable) added values which match their needs most closely."¹⁵

Ultimately a brand exists only in people's minds. Branding involves a set of techniques aimed at ensuring people perceive the product (or the destination) in a desirable way. This is not about dishonest manipulation, but about achieving a consistency in people's perceptions of the product (or destination) in a way that makes it stand out. And this must be for positive reasons that are based on the reality of its product strengths.

It is important to dispel some regular misconceptions about what a brand is. Many people refer to a brand when they are talking about a logo, which is merely a symbol of the brand. Often products are called brands, particularly in the world of consumer goods, which is an unhelpful form of shorthand that fails to convey the unique nature of a brand. This Handbook considers a brand to be **the essence of a product that makes it different from all other products in the eyes of its potential customers – its competitive identity**. This endows a product with a 'personality', which makes it:

- distinctive;
- memorable;
- valuable to specific market segments;
- and, hopefully therefore, resilient – thereby being more able to inspire loyalty and retain customers in hard times and, ideally, charge a premium because it is unique.

The nation or country brand

While this Handbook is primarily about destination branding, 'place branding', 'nation-branding' and 'country-branding' are becoming increasingly important. These refer to the holistic branding of a country, nation or place ('place' covers any recognisable geographical entity. It is used as a generic term, and can refer to a country, a region or a city). They relate to the way in which the place (i.e. city, region or country) presents itself on the national and international stage in terms of business, public diplomacy, culture and tourism. This underpins its effort to attract investors, businesses, visitors and students, as well as to enhance its reputation as a good place to live, to trust in international relations, and to do business and trade with.

We predict later in this Handbook that place branding, 'nation-branding' and 'country-branding' are going to drive the future of branding for countries, regions and cities, both as places to visit as well as

¹⁴ Schultz, D. E. and Kitchen, P. (2000), *Communicating Globally: An Integrated Marketing Approach*, Palgrave, United Kingdom, p. 65.

¹⁵ de Chernatony, L. and McDonald, M. (1998), *Creating Powerful Brands in Consumer, Service and Industrial Markets*, 2nd edition, Oxford, Butterworth-Heinemann, p. 20.

to invest in and do business with. But the destination brand will remain important, as it needs to appeal to a tourism-specific market. However, the case for working within the context of a place brand, nation brand or country brand (which are here treated as synonymous) is built on leveraging value from assets in one sector to boost perceptions in relation to another sector via a holistic place/nation/country brand. Also, when a place's/nation's/country's image is positive, this can rub off on individual sectors and enhance people's perceptions of their value. At the very least it is important that countries should not be sending out contradictory images by different sectors that undermine the overall national brand.

“The terms ‘national brand’ or ‘country brand’ have been coined to refer to the perception of a country in other countries, by governments, investors, potential consumers or travellers. A national brand helps others understand what a country is, making it more intelligible for diverse audiences. It provides a field of reference for framing news reports and creating narratives, and affects all sectors of the national economy. There is widespread consensus that for a country brand to function it needs to correspond to the intrinsic reality of the country and involve emotional elements that make it receptive to target audiences.”¹⁶

“A country brand should be the result of the collective imagery of the country, the system of conscious and unconscious mental evocations of a society that gives meaning to its Weltanschauung¹⁷ and to its relationship with its territory. A country brand, therefore, consists of an identity (history, national character, personality); an image (a system of signs and its code), its communication, its vocation and functions, and the benefits it provides for the society it represents.”¹⁸

The destination brand

Destination brand – Key points

- A destination brand is the place's **competitive identity**. It makes the destination distinctive and differentiates it from all others.
- A destination brand refers to the **enduring essence**, or core characteristics, of the destination, which comprise its personality and make it distinctive and different from all its competitors.
- A destination brand **exists in the eyes of the beholder**: it is a dynamic relationship between the destination and how it is perceived by potential customers and visitors.
- A destination brand is the **fundamental building block** from which all marketing communications and behaviour should flow.
- To be truly effective, there must be **harmony between the perceptions of a both visitors and residents** regarding the destination brand, in terms of the destination's key assets and the way in which it is presented in marketing communications.

A destination brand is probably best described as the essence of the destination from the perspective of potential visitors. But it should also be recognisable to residents. Ideally these two perspectives should gel and thereby reinforce each other.

The overriding aim is to create a competitive identity, which enables the destination to stand out above its competitors. It is the essence of the destination, as seen by potential visitors, that provides it with its competitive identity. The terms 'brand' and 'competitive identity' are therefore used synonymously throughout this Handbook. This deliberately incorporates a sense of purpose into the definition of the

16 World Tourism Organization (2008), *Colombia – Back on the Map of World Tourism*, UNWTO, Madrid.

17 German word, roughly meaning a world view, or a summary of one's life experiences.

18 World Tourism Organization (2008), *Colombia – Back on the Map of World Tourism*, UNWTO, Madrid.

destination brand: it is the destination's brand essence that endows it with a unique identity which differentiates it from everywhere else and thereby enables it to stand out from its competitors in competing for the attention of potential visitors.

The brand should drive:

- all NTO strategy, communication and behaviour;
- positioning for the destination;
- a common set of core values, which flex by market segment. (i.e. some will resonate more with some segments than others: e.g. tranquillity might appeal more to an older segment, while adventure might appeal more to a younger segment);
- a common tone of voice;
- the imagery used in marketing communications;
- one brand identity/logo.

A destination brand is largely a result of the values the destination projects and the way this makes visitors feel about the place. Fundamental to a destination brand are the stories it tells about itself to its main audiences. These bring the destination alive. They must be based on fact, not invented; but they should inspire people's imagination, rather than merely describe the destination.

The following definition, which will be used throughout this Handbook, captures the most significant elements of a destination brand. This emphasises the dynamic relationship between the destination and potential visitors, as well as the emotional association between them. It also indicates the difference between destination brands and manufactured brands. And it is a practical definition that incorporates the fundamental notion of competitive differentiation, which is the primary purpose of all branding.

Destination brand – A dynamic definition

*"A destination brand is the **sum of perceptions** that someone has about a place (whether based on experience, hearsay or prejudice), which influence his/her attitudes towards that destination at an emotional level.*

*It represents the mix of the **core characteristics** of the place that make it distinctive and memorable.*

*It is the **enduring essence** of the place that makes it different from all other places (and competitors).*

*Importantly, a destination brand exists in the **eyes of the beholder**. It has to be credible and real, it cannot be manufactured.*

*It is the way in **which a destination nurtures, develops and presents its core characteristics to its main audiences** that enables it to establish, reinforce, or even change its reputation. This is otherwise known as the branding process."*

Buncle, T. (2003), Yellow Railroad, United Kingdom

Significantly, unlike consumer goods, a destination inherits its brand. With some limited exceptions (e.g. Las Vegas, Dubai), a destination cannot manufacture or dramatically alter its topography, culture or heritage. It cannot re-invent itself overnight in the way that a manufacturer, such as Coca Cola, can invent a new product line. It therefore has to identify its assets, build on them and promote them in a way that differentiates it from all other destinations. It can of course add new products – such as theme

parks or hiking trails – that might enhance its appeal and enable it to attract to new markets. But these are unlikely to alter the fundamental character of the destination, at least in the short to medium term.

Destinations therefore need to identify their most potent appeals, seek the essence that makes them different and attractive to visitors, and consistently promote this essence through all marketing communications and behaviour. Over time this will help the destination gain a consistent reputation, based on these brand values.

A consistently projected brand will also provide a coherent ‘story’ about the destination that will equip it better to withstand shocks that might temporarily reduce its appeal in the eyes of the world, such as terrorist incidents, conflict, economic recession, or unpopular leadership. While it is hard to counteract a negative reputation that has been deeply embedded over time, a strong destination brand can present an alternative and positive perspective, which can begin to change a country’s image. The stronger a destination brand is, the better the destination will be able to withstand such shocks and emerge from crises more quickly. Ideally of course, there should be a greater predominance of positive external factors influencing perceptions of the destination than negative.

Northern Ireland is a good example of a destination that has dramatically improved its international image (and visitor numbers) by focusing consistently on its core brand values associated with welcome, friendliness and humour to change widespread and deeply held negative perceptions that might otherwise have taken far longer to change after the peace process was begun.

Although a destination inherits its brand, rebranding is, nevertheless, possible. However, any attempt at rebranding, such as Spain’s successful repositioning as a cultural destination from its ‘bucket and spade’ cheap beach holiday image, takes an enormous amount of time, effort, commitment and funding. Even then, Spain’s natural and cultural assets have not changed. The strengths of its appeals to a more affluent market were selectively identified and single-mindedly promoted over a considerable period of time. It just cleverly drew the world’s attention to some of its inherited and contemporary assets that had been under-exposed, which would appeal to a very different market than hitherto. Arguably this also endowed a Spanish beach holiday with a greater caché than a similar holiday in many other beach destinations. Rebranding and refreshing the brand are dealt with later in the Handbook (see 2.5.8 *Brand Lifespan* and chapter 6 *Branding Strategies in Action*).

Why brand a destination?

Many people view the idea of branding a country, a city or a region, sceptically. They consider the notion of branding to be reminiscent of the sort of sharp sales tactics associated with highly utilitarian, fast moving consumer products such as soap powder, but wholly inappropriate for a destination, which embodies centuries of history, a proud cultural heritage and a landscape whose origins lie in the geological upheavals of prehistory, or even divine creation. It is not seen as something that can be manufactured or tampered with. Yet, in the competitive commercial world of tourism these natural, cultural and historical assets are all taken for granted and actively sought after.

Olins makes it clear that a destination brand must be based on real substance. It is not an ephemeral marketing concept: “It cannot be conjured up out of thin air: it must draw from reality but it has to be focused, recognizable, coherent and attractive. The most successful national brands are not simply invented, they are based upon a mood, upon the current reality, which they encapsulate and then promote. In this sense they are organic and self-developing. But they need guidance if they are to realise their potential.”¹⁹

So, if a destination wants to attract tourists, it has to give them reasons to visit. And it has to demonstrate how it is different from all other destinations, or it will not be seen as distinctive and worth visiting. This is self-evident. But – and this is often misunderstood – this process of differentiating one destination

19 Olins, W. (2007), ‘Branding the Nation’, in: *On Br@nd*, Thames and Hudson, United Kingdom, p. 166.

from another is actually about branding. It is about identifying what makes a destination unique and communicating these differences consistently in order to encourage potential visitors to understand the distinctive appeals of the destination so that they will want to visit it.

However, a destination's brand image is influenced by many factors, most of which are well beyond the destination brand manager's control – both positive and negative, contemporary and historic – such as news reports, films, books, word-of-mouth, the destination's history as it has been filtered in the consumer's country, and iconic individuals from that country, whether political giants, such as John F. Kennedy and Nelson Mandela, movie stars, rock stars, historical figures, inventors or even despots, such as Saddam Hussein. Consequently, the best a destination manager can hope to do is to try to anchor the presentation of the destination around a few core truths that are consistently presented by the NTO and the destination's stakeholders when they talk to the outside world. This, and the behaviour of the destination's residents, is the best hope of securing a relatively consistent picture of the destination in the minds of potential visitors. It may be a small gesture in the face of the many sources of information and prejudice about the destination to which outsiders are exposed, but it offers a flag around which all the destination's stakeholders can rally. And if they all present the destination in a consistent fashion, then the chances of the destination being recognised as distinctive are multiplied.

For many people the antipathy towards the term 'branding' is a matter of semantics rather than principle. Once this straightforward business argument is understood, any negative connotation of the term 'branding', by virtue of its association with low value products and sharp sales tactics, can be dispelled. It is not about disingenuously manipulating people's perceptions or the destination pretending to be something it is not. It is about highlighting the destination's best assets to give it a competitive identity in a highly competitive global marketplace, in which people's awareness of different destinations is limited, their attention span short, and the competitive 'noise' very loud.

The rationale behind this process has been clearly articulated by Simon Anholt:

- “In the globalised world in which we now live, **every place has to compete with every other place** for share of mind, share of income, share of talent, share of voice.
- Unless a place can come to **stand for something**, it stands little chance of being remembered for long enough to compete for any of this precious attention.
- Most of us spend no more than a **few seconds** each year thinking about a country on the other side of the world.”
- “So, unless that country **always seems exactly like itself** every time it crops up, there is little chance that those few seconds will ever add up to a preference for its products, a desire to go and visit the place, an interest in its culture, or, if we were prejudiced beforehand, a change of heart.”

Source: Anholt, S. (2006), *Competitive Identity: The New Brand Management for Nations, Cities and Regions*, Palgrave Macmillan, United Kingdom.

The difference between a destination product and a destination brand is that a destination product is a neutral description that has no emotional value invested in it. A destination brand, on the other hand, is a description of the core essence of the place in terms of its values as perceived by consumers; it is about the emotional relationship between the place and its visitors – how they perceive the enduring nature of the destination in relation to other places. In short, it is about the personality of the place and how it makes people feel about it.

What is *not* a brand?

A brand is not:

- a product;
- a logo;
- a slogan or strapline;
- imagery;
- a design style;
- a marketing campaign.

Apart from a **'product'**, which is the raw material of the destination, these are all elements that are used in marketing a destination. They should flow, or be informed by, the destination brand. But they are not the brand. The brand should be embedded in them all, so that they consistently reflect the destination's brand values in every single act of marketing communication.

A logo is a symbol that, through consistent usage over time, achieves recognition for the destination. It is a symbol, or visual shorthand, that represents the product or destination (cf. the Nike tick). It is unlikely to be capable of succinctly summarising a destination's brand values without being cluttered and cumbersome. However, if it is attractive, instantly recognisable as emanating from that destination, and can achieve impact in the way that Spain's *el sol de Miró* logo has done, it will be very powerful. But it is not in itself a brand. And, as few destinations can replicate the impact of Spain's *el sol de Miró* logo, a logo's power generally comes from its consistent application, which enables recognition, much more than from its component parts (see 3.2.3 *The Logo: Brand Essence or Symbol?*).

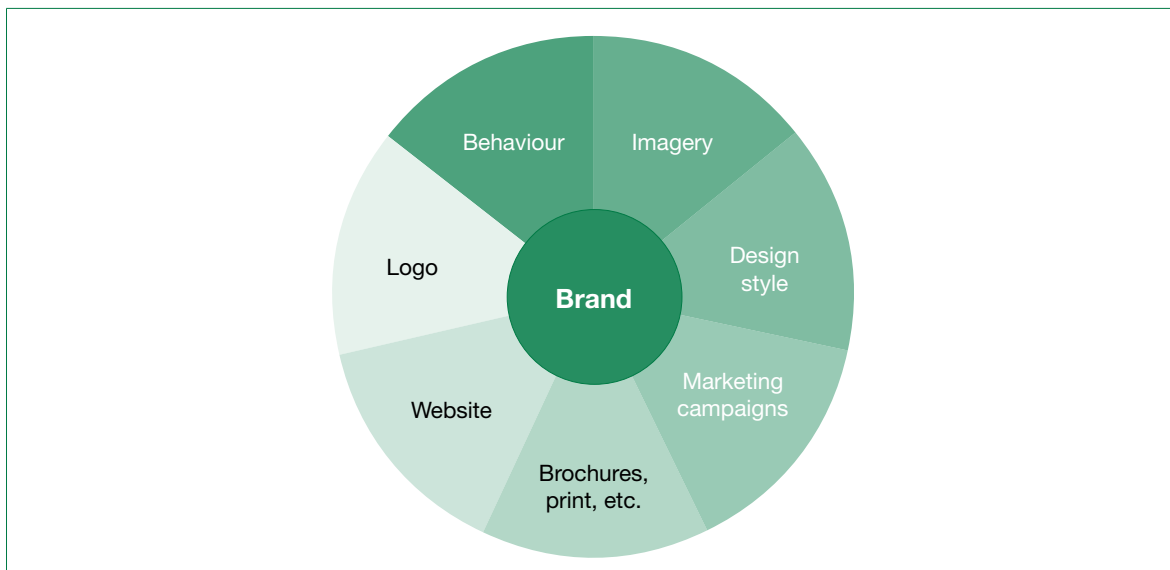
Slogans or straplines usually accompany a logo. But they do not need to. They are great if they can convey the destination's essence in such a way that it could be nowhere else. But this is the holy grail of branding. Very few do, or ever could (see 3.2.4 *Slogans and Straplines*).

Imagery is important in conveying the brand essence and building up a feel for the destination. But it does not in itself constitute a brand. However, the destination brand should guide all imagery used and photography taken, so that all imagery reflects the country's brand values.

Design style is important in making destination marketing communications accessible and inviting. Ideally it should also reflect the destination's brand values (e.g. light-hearted, warm, etc.). But, as with logos, slogans and imagery, it should be informed by, and flow from, the brand. It is not in itself a brand.

Marketing campaigns should always be brand-compliant and reflect the destination brand in their visual imagery and tone. The brand should flow through all marketing communications to reflect the destination's sense of place.

The brand lies at the core of all these marketing activities. It is what breathes life into them. It should guide the way all marketing communications and, ideally behaviour, are expressed (see figure 1.3).

Figure 1.3 Brand at the core of all marketing activities and behaviour

Source: Yellow Railroad

1.2.1 Different Brand Types

The following types of brands are explored below:

- **Consumer product brands;**
- **service brands;**
- **destination brands;**
- **place brands.**

Different types of destination brands are then assessed with a focus on when they can be used to best effect:

- **Thematic brands;**
- **geographic versus thematic brands;**
- **events and their role in reinforcing destination brands.**

1.2.2 Consumer Product Brands

The fast moving consumer goods (FMCG) sector is considered by many to be the home of some of the best branding practice. Certainly the principles of branding such goods are transferable to all types of products. One area in which this sector has demonstrated the importance of branding is in attaching emotional values to rather dull products from soap powder to razor blades. (Imagine trying to define the core brand values of one shampoo versus another.) When there is little technical difference between one product and another, emotional values associated with the product become a significant differentiating factor. This may be achieved through celebrity endorsement of shampoo, by suggesting that only macho men use a particular razor blade, or any number of other techniques that have nothing to do with the

inherent quality of the product. However, although they may inspire less enthusiasm than a holiday destination, FMCG companies do have certain advantages that a destination does not:

- They control, own and manufacture the products.
- They can discontinue, change or re-design products that aren't selling well.
- They can invent new products (e.g. by adding vanilla to Coke).

Destinations, on the other hand, are generally appealing, unlike many functional FMCG products such as razor blades. In this destination managers are relatively fortunate, as it gives them a head-start in identifying their distinctiveness.

1.2.3 Service Brands

Product brands (such as toiletries, food products and cars) are generally easier to control because they tend to be manufactured. They are inanimate objects whose reputation for quality lies with the manufacturers. Service brands on the other hand (such as insurance, financial services, airlines and hotels) are highly vulnerable, because their reputation depends on an interaction between people who provide a service and customers. And this service tends to be a process that takes place over time, rather than the instant delivery of a product, during which time there may be several points at which the service might fall short of customer expectations.

While this is a critical issue for businesses that provide specific elements of a holiday, such as airlines and hotels, the risk is magnified many more times for a destination, which comprises a wide range of holiday experiences over a considerable period of time, as well as a wide range of services that are not controlled by the destination manager. Failure to match customers' expectations in any one of many experiences over the course of a holiday could damage the destination's reputation.

Olins stresses the importance of behaviour for service brands: "Behaviour is almost always the most significant element in service brands. Service-led branding is quite different from product-led branding. In a product brand, the customer experience, generally, is consistent. One Mars bar tastes much like another: however many times you eat it, it tastes the same. In a service brand, however, like an airline, every single experience is different – because every time you deal with different people. Ice cream doesn't get headaches or have trouble with kids, but the people who represent a service brand do."²⁰

1.2.4 Destination Brands

A destination brand refers to the qualities of a place as somewhere attractive to visit. For the purpose of this Handbook, the focus is on 'discretionary visitors', who are essentially people who could choose to go somewhere else. This covers primarily leisure, conference, meetings and incentive visitors, whom NTOs compete hard to attract. People who travel to visit friends and family or for 'non-discretionary' business reasons, such as sales trips and client meetings, have specific reasons for visiting a particular destination that are generally less open to influence.

Non-discretionary visitors are therefore less interesting to NTOs because NTOs have less influence over their decision to travel or their choice of destination. Nevertheless non-discretionary visitors' experience of a destination can be quite influential in their perception of it and, consequently, whether they become 'sales promotion officers' or 'sales prevention officers' for that destination in the way they talk about it when they return home.

²⁰ Olins, W. (2008), *The Brand Handbook*, Thames and Hudson, United Kingdom, p. 42.

As explained above, destinations have much less flexibility than FMCG products to modify their product because:

- they generally do not own, control or manufacture the destination product;
- the core destination product is usually linked to the landscape, scenery, cultural heritage and people, which are inherited assets, or it is a built or manufactured asset (e.g. Disneyland, Las Vegas), which is owned and controlled by private companies;
- destinations are generally more complex: they comprise a fluid mix of people, history, culture, and often a varied landscape, built heritage, languages, value systems, changing behaviours, and service providers.

Some modification of the product is of course possible (e.g. by developing national parks and introducing animals; building a new destination, such as Dubai; developing opportunities for adventure, such as Queenstown, New Zealand). However, unless the experience is absolutely unique (as in the case of Disneyland and Las Vegas), the destination will always have to answer the potential visitor's question: "Why would I choose to have this experience in country X, rather than country Y or Z?" What, for instance, is the difference between hiking in Slovenia, the Czech Republic, Crete or Montenegro; or between sailing in Greece, Turkey or Croatia? And, when all other factors such as the hiking terrain, offshore wind conditions for sailing and visitor facilities are equal, the answer usually lies somewhere in the potential visitor's perception of the destination and its emotional appeal.

Visit Britain talks about the importance of putting the subject into a **human context**: "So it's not just about the castle, it's the stories surrounding those who lived there. It's talking about the gardener who's created the garden, as well as the garden. It's not just the National Park but the spirit of the communities making it a living landscape."

By courtesy of Visit Britain (2009), *Brand Toolkit: The Brand in Your Hand – An Overview of the Britain Brand*.

Ultimately, a destination brand needs to communicate its 'sense of place' and create an emotional link with its audience. This is about telling a story – a story that provides an insight into the place, its people, its history, the way it views the world and how it relates to its environment. It is about bringing the place to life and making it relevant to people today.

1.2.5 Place Brands

Place brands – Key points

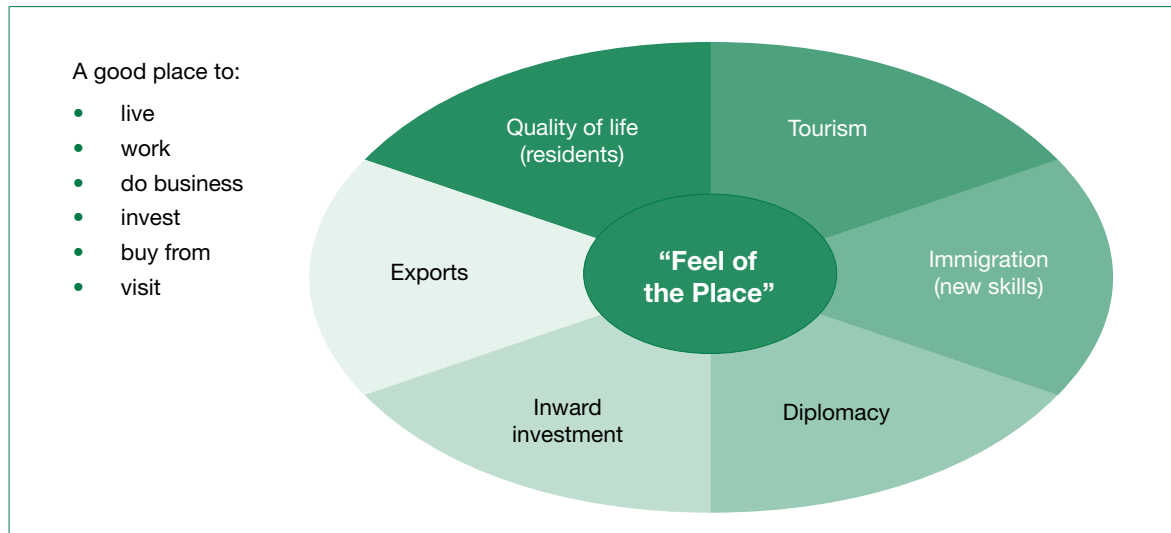
- A place brand is more holistic than a destination brand in that it **transcends several sectors** (e.g. tourism, manufacturing, inward investment and exports, as well as sport, education and entertainment).
- Its aim is to convey the spirit of the place (**'sense of place'**) as somewhere that is attractive to live, visit, work, do business with and study in.
- However, a place brand is not a substitute for a destination brand. There is **still a need for a destination brand** to target specific tourism segments. But there should be a strong link between the destination and the overall place brand.

The term 'place' is a much more holistic concept than 'destination'. 'Place' embraces the total economic activity and feel of a place. The term 'place' can refer to a nation (or country), a city or a region. It doesn't just relate to tourism. Place marketing and place branding are concerned with attracting people

who can choose where they live, work, study or visit, to choose to do so in a particular place. They are talented, mobile people who bring wealth and investment with them.

Increasingly place managers and destination managers are working together to develop and project a more holistic image of their place. This is because they recognise the power of elements beyond just their place's appeal as a visitor destination to contribute to its competitive identity across all economic sectors.

Figure 1.4 Sense of place – Why is a sense of place important?



Source: Yellow Railroad

That said, somewhere that is attractive to live in and visit is often disproportionately appealing to invest and do business in. When all other rational factors (e.g. labour skills, productivity, access to markets, etc.) are equal, the appeal of a place as attractive to live in and visit can give it a competitive edge. And significantly, it is often the marketing of the place as a tourism destination that achieves the greatest visibility and impact amongst external audiences in other, non-tourism sectors, after word-of-mouth. In short an attractive place is an attractive place, regardless of the sector you work in.

The importance of a ‘sense of place’

People who can choose where they want to live and work tend to be talented, entrepreneurial, highly educated professionals who are closely identified with the new technologies, high-added value services and internationally traded goods and services that drive economic growth. In other words, the sort of people most places want to drive their economies. And a place that offers an attractive lifestyle often has a significant visitor appeal, and vice-versa. This is the simple foundation of place-making and marketing. Satisfying the rational economic needs of business is part of the solution; but attending to those elements that give it character, such as the physical environment, social and human factors that make it a ‘good place to be’, and ‘somewhere that people talk about’, is the other part. It is the part that can, and should, remain consistent through time, transcend economic downturns and underpin the place's long-term economic sustainability.

Place-branding is about identifying those assets that make somewhere attractive as a place in which to live, work, invest, do business, and visit. Above all it is about identifying what makes a place distinctive and different from other places and then communicating that competitive edge consistently to potential customers in the outside world whom the place is trying to attract. It is also about establishing a future vision for the place that will unify the local community and guide both public and private investment to shape the place's future. This requires the authorities to have a realistic understanding of their place's standing in relation to its competitors for economic growth and to identify how it can develop a competitive edge.

There are many factors that contribute towards the appeal of a place. A World Cities Brand Index²¹, constructed from research amongst consumers and business people, offers a valuable insight into five key factors that determine the health of a global city brand:

- Vibrancy of the culture;
- standard of living;
- attractiveness as a short-break destination;
- suitability of the climate;
- positive word-of-mouth.

A similar range of ‘soft’ criteria (plus two ‘hard’ economic criteria) is used by The Academy of Urbanism²² in the United Kingdom and Ireland, when awarding the title of “Best City in Britain and Ireland”:

- A strong city-region economy, including a dynamic business sector and a skilled workforce;
- a distinctive sense of place and history;
- superb quality of life and a vibrant culture;
- green credentials, including quality open space;
- a focus on mixed-use developments, including sustainable transport, plus good transport links.

In a world of increasing homogeneity, driven by globalisation and technology, a distinctive ‘**sense of place**’ is becoming increasingly important for cities and countries to deliver competitive economic advantage. A sense of place exists in both outsiders’ perceptions and residents’ feelings about the place. It is important that prospective **external customers and local residents both share a similar view of the place**, based on the place’s evident and credible strengths. If these two perceptions are not in relative harmony with each other, then the place’s economic performance is likely to be sub-optimal. But if they are in harmony, then ideally, this can lead to a virtuous cycle whereby reinforcement of the place’s core values through residents’ behaviour influences external customers’ perceptions; in turn, these positive external perceptions – and the resulting business this brings – further reinforce residents’ pride in the place and enhance their quality of life. This is not meant to suggest that a ‘sense of place’ is a panacea for all economic and social development problems; but it can add a considerable competitive advantage over other places if clearly identified, managed effectively, astutely nurtured in terms of the new developments and investments it attracts, and robustly marketed.

A sense of place is created by a number of factors. These mostly derive from the following:

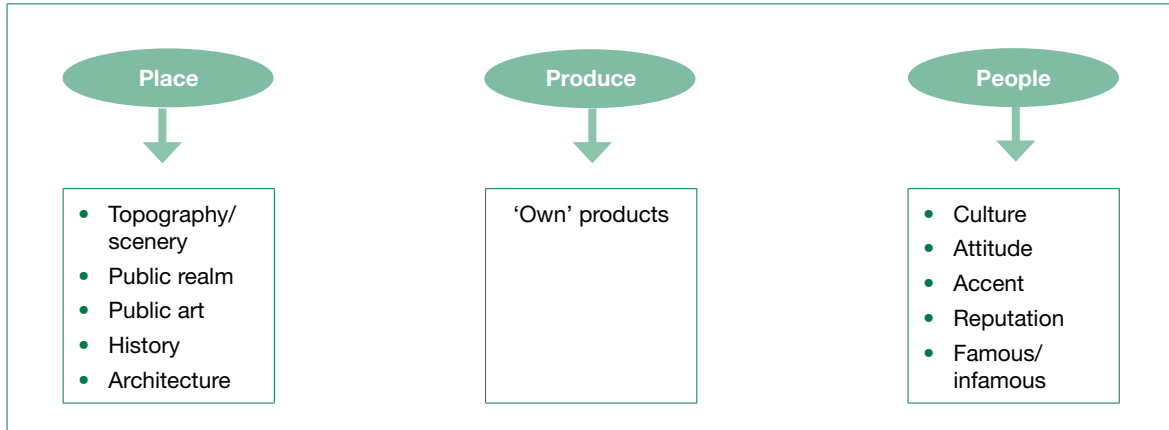
- **Place:** The physical appearance, its history and cultural heritage, its built and natural environment, the way it presents itself today in terms of its public realm and the type of events it puts on (e.g. Paris – history, built environment and cultural heritage; Costa Rica – natural environment; Mali – desert music festival).
- **Produce:** Products with which the place is associated. These tend to be products that have long been produced in the place which it therefore ‘owns’ (e.g. Scotch whisky, Belgian chocolate, French champagne, Cuban cigars, Swiss watches, Italian fashion, Japanese electronics, German engineering (cars), New Zealand lamb, etc.).
- **People:** The role of people in contributing to impressions of a place is often underestimated. Citizens and residents play an important role in defining the way in which others see the place: in terms of their culture (historic and contemporary), the way they behave, their attitudes, how they treat outsiders and visitors, their accent, their reputation within the nation’s history and how

²¹ Leo Burnett (2009), *World Cities Brand Index*.

²² The Academy of Urbanism (2009) (Online), available: www.academyofurbanism.org. United Kingdom (31-03-2009).

they have contributed to the national character (e.g. South Africa – Nelson Mandela; Barcelona – Gaudi).

Figure 1.5 The DNA of a place



Source: Yellow Railroad

1.2.6 Thematic Brands

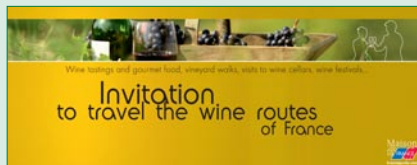
Thematic branding – Key questions:

- What makes this theme **unique** to, or at least powerful for, my destination?
- What does the **essence of the destination add** to this themed experience? (E.g. What is the French-ness about food in France, or Italian-ness about style in Italy?)

Brands do not need to be purely geographic. Sometimes purely geographic brands have less impact and fail to convey the wealth of different experiences that the destination has to offer. Thematic brands can often be more powerful than geographic brands because they tell a story. Thematic brands can establish a direct relationship with potential visitors on an emotional level, because of this story.

Thematic branding by area of interest:

France uses a themed approach to target people interested in pilgrimage/spiritual tourism and, for perhaps a more general audience, wine routes.



Thematic branding refers to the selection of a particular theme, usually based on the interests of a particular segment, which unites the products and experiences that a destination offers in the eyes of that segment. For instance, people who are interested in art, cuisine, adventure or culture will warm

to brands built around these themes. Thematic brands can also be useful where a country shares a similar geography and culture with its neighbours, which reduces its opportunities for differentiation. By working with its similar neighbours, a destination can establish more impact than it might otherwise be able to do on its own, by leveraging the values it shares with its neighbours.

Thematic branding is important because people are different. Most destinations will have a range of different products and experiences that appeal to different market segments with diverse motivations. Themed branding enables destinations to tailor their marketing to individual market segments. They can take the form of themes such as adventure, cuisine, luxury, tranquillity, etc. However, **it is important that all thematic brands ensure they reflect the destination's brand values; otherwise they will just become a collection of 'me too' products.**

N.B. Theming on the basis of a 'route' or 'trail' (e.g. French wine routes) should not be interpreted too literally. Few visitors, except perhaps true aficionados, will follow the exact route and slavishly visit every part of it. However, it works as a theme, by reinforcing an element of the overall country brand, and acts as a rough guide to an area using an appeal that has, hopefully, been identified through research as having significant visitor appeal.

1.2.7 Geographic versus Thematic Branding

Geographic branding refers to the branding of a place within the limits of clear geographic boundaries (e.g. countries, cities, regions). Thematic branding refers to the branding of a place according to specific themes that appeal to particular market segments (e.g. France – world capital of gastronomy; Scotland – home of golf).

A destination can use several different themes, as long as they are all areas in which it has a reasonable competitive advantage. Significantly too, thematic branding can transcend geographic branding, enabling different countries and regions to work together where they offer similar experiences (e.g. historic cities work together in the United Kingdom to promote themselves internationally under the banner of a 'British Heritage Cities' marketing consortium).

There are five significant issues to address when considering whether to use geographic or themed branding:

- **Distance versus proximity:** Generally, the further away, or less well known, the destination is from its target market, the more important a geographically-defined brand will be, particularly where visitors are not travelling for a specific purpose or to pursue an activity, and whose holiday motivation is more 'general' (e.g. to 'get away from it all', to relax, or to see somewhere different).
- **Precise targeting:** Themed branding permits more precise targeting of market segments, according to their travel motivation. This flexibility can be particularly useful for destinations that have a wide diversity of different products and experiences available to the visitor.
- **Complementarity:** Geographic and themed branding are not mutually exclusive. Themed brands can be presented as sub-brands of a geographic destination brand. They may even define the destination to a degree, in the way, for instance, that extreme sports, adrenalin activities and outdoor pursuits are integral to the New Zealand destination brand.
- **Geography and theme are mutually reinforcing:** Even when using themed brands, there should be a flavour of the destination as a geographical entity, which underlines the competitive impact of the theme. In other words it should not be irrelevant that the themed experience is available in that particular destination. For instance, good food can be eaten all over the world, but what makes a food-themed brand more powerful for France or Singapore, or a style-themed brand more powerful for Italy or Japan? Why should I go sailing in Croatia, rather than Greece or Turkey? Clearly the perceived quality of the product that underpins these experiences in these countries is important; but so too is the emotional association with them.

- **Transcending boundaries:** Thematic branding and marketing can transcend geographical boundaries, both within and between countries.

This is most likely to be effective where the countries or regions share a destination appeal (e.g. similar culture, landscape, architectural heritage, adventure activity opportunities) and are small enough to enable visitors to take a multi-country tour (e.g. long-haul visitors who may wish to include a number of similar countries in their visit). This can also enable higher impact marketing campaigns, as a result of a bigger brand offer and combined marketing funds.

Examples of cross-boundary thematic brands:

A **Baltic capitals** brand might unite Tallinn, Riga and Saint Petersburg, using a seaborne-trading and cultural heritage theme.

Themed trails, such as coastal trails and maritime heritage trails are used in the United Kingdom to link elements of otherwise disparate counties. These are not so much aimed at people who might walk the entire trail, but at developing a theme to brand and differentiate an area, so that it has a stronger market impact than each individual county could achieve on its own.

1.2.8 Events: Reinforcing the Brand

Destinations can use events to reinforce their brand. This means either mounting indigenous events, or attracting internationally mobile events, which can reinforce the destination's brand values. Events can be powerful in anchoring, and sometimes even changing, a destination's image. The most powerful events tend to be cultural and sporting.

For example, a country that wishes to project itself as **adventurous and scenically dramatic** might bid to host a major sporting event (e.g. Scotland hosted the Mountain Bike World Cup in 2008). Or a city that wants to project itself as **culturally vibrant** might mount a regular cultural event with international resonance (e.g. Glasgow's annual Celtic Connections music festival). Edinburgh's International Festival, around which several other festivals have grown, has firmly established the city's cultural credentials as one defining characteristic of the city's brand. Indigenous festivals that embrace the entire country can help project a destination on the international stage.

The annual desert music festival in **Mali** has not only put Mali on the map for a niche of international travellers, but it has become, for many, a defining characteristic of that country.

On a larger scale, cities can use **international awards**, such as the "European Capital of Culture", to boost their image amongst a wider audience, as well as to build on their existing cultural capital.

Liverpool used its status as European Capital of Culture 2008 very successfully, by building on its fame as the home of the Beatles and the "Mersey sound" to introduce the world to a much wider range of its vibrant indigenous culture. It also established itself indelibly on the cultural map of Britain as a place where the boundaries of cultural creativity were being continually pushed. And, during its reign as European Capital of Culture, Liverpool also reinforced its reputation as a friendly, straight-talking, humorous place, through visitors to the city and media reports.

Lesser-known cities can also use such high profile international accolades to propel themselves on to the world stage. Lithuania's capital, Vilnius, committed to using its status as European Capital of Culture in 2009 to increase international awareness of the city through its cultural designation.

Major sporting events, of which the Olympic Games has by far the highest profile, can be transformational for a nation. Their impact transcends the 'destination' and says much more about the 'place'. This can be invaluable from the perspective of inward investment, political diplomacy and, probably to a lesser extent, tourism. The extent to which they transform a nation's economy and its international image depend on international perceptions of the place before the Games. Although the Olympic Games are awarded to a city, it is the nation's, rather than the city's, character and brand values that people tend to see reflected in the way in which the Olympic Games are hosted.

Sydney's hosting of the **2000 Olympic Games** reinforced Australian brand values of youthful vibrancy, friendly people, and a 'can-do' attitude.

Beijing's hosting of the **2008 Olympic Games**, however, projected a completely new image of a competent, confident and more open China on to the international stage: "For China, the 2008 Olympic Games arguably represented the single most important opportunity to address the 'deficit of global respect', a term coined by Orville Schell to describe the sense within China that the country's international standing is not in line with its self image".²³

Importantly, major events can have a significant impact in both accelerating **regeneration programmes** and in inspiring new confidence and a sense of **civic pride** in the city's citizens.

Manchester's hosting of the **2002 Commonwealth Games** not only gave a substantial boost to the regeneration of East Manchester, but it also provided the basis for Manchester to build on its sporting image (which had up until then been in large part due to Manchester United Football Club, a major global brand) by creating Sportcity, Europe's largest concentration of sporting venues²⁴, including Manchester City Football Club, the National Squash Centre, the English Institute of Sport and others.

Manchester's friendly, extroverted personality was also projected through the novel use of seventeen thousand volunteers²⁵ during the Games, which was described as the "biggest volunteer recruitment drive in the United Kingdom in peacetime"²⁶. This innovative volunteer programme, which involved thousands of the city's residents directly in the Games, created "...a palpable sense of pride amongst the community recorded by regeneration agencies".²⁷

Glasgow used festivals, such as the Glasgow Garden Festival in 1988 and its European Capital of Culture award in 1990, to kick start a **regeneration** of its domestic image, which had been one of industrial decline and social deprivation. Clearly several other factors, including a single-minded commitment to regeneration by Glasgow City Council, contributed to Glasgow's change in fortune. But a focus on bidding for, and winning such events played a significant part in both convincing residents that Glasgow could change and in persuading people outside the city that it was changing. The results are now obvious: Glasgow is seen as one of Britain's top cities for culture and was the fifth most visited city in Britain by international visitors in 2005.²⁸

23 Future Brand (2008), *Country Brand Index* (Online), available: www.futurebrand.com (31-03-2009).

24 Manchester City Council (n.d.), *Sportcity* (Online), available: www.sportcity-manchester.com/ (31-03-2009).

25 Manchester City Council (2005) (Online), available: www.manchester.gov.uk/site/scripts/news_article.php?newsID=616 (31-03-2009).

26 BBC (2002), 'Commonwealth Games – Crew 2002' (Online), available: www.bbc.co.uk/1/hi/2002/02/0202_volunteers/index.shtml (31-03-2009).

27 Commonwealth Games Legacy Manchester (2002) (Online), available: www.gameslegacy.co.uk/cgi-bin/index.cgi/27 (31-03-2009).

28 VisitBritain (2005) (Online), available: www.tourismtrade.org.uk/Search/default.asp (31-03-2009).

Similarly, cities and countries can target **conferences** that might reflect their brand values (e.g. Countries that project themselves as environmentally sustainable might bid to host conferences on environmental issues such as climate change, environmental conservation or biotechnology).

Belize committed to hosting the 2009 World Conference on Responsible Tourism, organised by the International Centre for Responsible Tourism, following the country's unveiling of a new sustainable tourism development plan. This sent a clear signal about the country's intentions regarding sustainability as a core asset and brand value.

Clusters of businesses or types of organization can also say a lot about the character of a city or a country. This can be reinforced by the type of businesses it sets out to attract, as part of its inward investment policy.

Bristol, England, reinforced its reputation as Britain's most sustainable city in 2008²⁹ by accumulating a cluster of over 300 environmental technology businesses and United Kingdom headquarters of 'green-thinking' businesses and organizations in the city, such as:

- Sustrans, a leading sustainable transport charity;
- The Soil Association, the United Kingdom's leading campaigning and certification organization for organic food and farming;
- The Slow Food Movement;
- Triodos Bank, one of Europe's leading ethical banks;
- The United Kingdom Environment Agency;
- Schumacher UK, which focuses on promoting human scale sustainable development ("Small is Beautiful");
- The Community Recycling Network.

These organizations, along with Bristol's designation as Britain's first "Cycling City" and its bid for "European Green Capital" status, project a strong sense of a city that sees a commitment to sustainability as one of its core brand values.

1.3 The Future

1.3.1 Travel Motivation: The Experience Economy

The 'experience economy'³⁰ has been used to describe the new type of economy in developed countries, which follows on from the industrial and service economies. This refers to the notion that people are seeking a different kind of value return from their disposable income, which is increasingly taking the form of an experience, rather than a physical product. When they have sufficient levels of comfort, people tend to seek more fulfilling experiences, particularly as they become more affluent. In terms of travel behaviour, this is evidenced by a search for authenticity, escape from the frenetic pace of everyday life, and the opportunity to refresh the soul or reconnect with a partner/family in a more

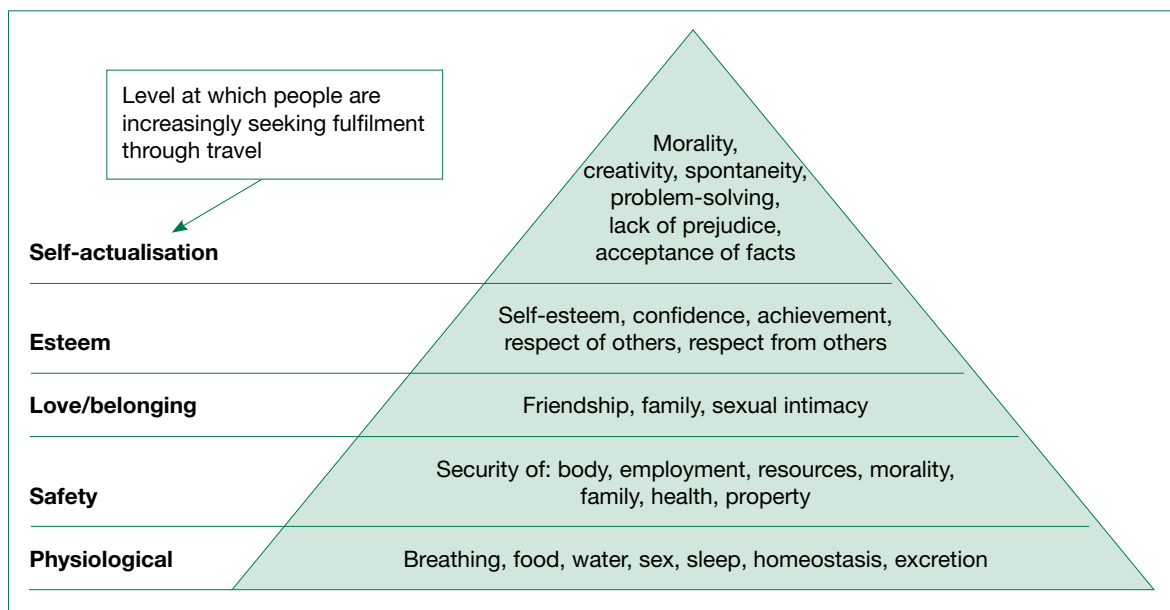
29 Forum for the Future (2008), *Sustainable Cities Index 2008* (Online), available: <http://www.forumforthefuture.org/node/10000> (31-03-2009).

30 Pine, B. H., and Gilmore, J. H. (1999), *The Experience Economy: Work is Theater and Every Business a Stage*, Harvard Business School Press, Boston.

tranquil environment (see 1.1.1 *Global Tourism Trends*). This can take many forms, such as travelling to learn another language, to learn to paint, to experience a different culture, to pursue an interest or hobby such as bird watching or scuba diving. In other words the experience becomes the object of the holiday, not just relaxation or sightseeing. Fulfilment comes from involvement, understanding and self-improvement – returning home a more knowledgeable, spiritually refreshed, or more experienced person.

This reflects the progression through Maslow’s hierarchy of needs from the satisfaction of basic physiological to self-actualisation needs, whereby travel increasingly fulfils the need for self-actualisation.

Figure 1.6 Maslow’s hierarchy of needs



Maslow’s theory is not, however, strictly hierarchical, as many of these needs co-exist simultaneously and vary in importance according to people’s life stages and individual circumstances. Nevertheless, the need for ‘self-actualisation’, which is the stage at which travel becomes more significant, is a ‘luxury’ that is, understandably, more prevalent in developed economies. People in developed economies, in which basic and intermediate needs have been met and who are more affluent, are therefore more likely to seek travel as a means of ‘self-actualisation’. More significantly, the more they travel, and the more educated they are, the greater their demand tends to be for ‘experiential’ travel, rather than travelling merely for physical relaxation or sightseeing.

Consequently, the more a destination can engage with potential visitors on an emotional level as somewhere that promises to fulfil this demand for a fulfilling experience, the more chance it has of attracting the growing number of people, particularly in developing countries, who see the type of holiday they take as an expression of their personality. It is therefore becoming increasingly important for destinations to convey the emotional benefits they can offer visitors in terms of feelings and experiences, rather than just present them with a list of things to do. This means telling a story about the destination, which strikes an emotional chord with potential visitors and stays with them.

This places a heavy burden on creative marketing agencies to convey subtle messages that intrigue and inspire potential visitors, and to establish an emotional connection with them. But this must be done without crossing the line into heavy-handed and patronising descriptions of how the destination will make them feel. Marketing communications will be far more effective if they enable potential visitors to ‘take out’ a sense of how the destination will make them feel, rather than making bold statements to this effect. This is a real creative challenge for marketing agencies and NTOs. The more an NTO truly understands its core brand values, the easier it will be to achieve the subtlety required to reflect these values in its marketing communications.

For an insight into how an NTO and a regional destination management organization advise stakeholders how to communicate the experiential promise of a destination, see:

- Australia:
<http://www.tourism.australia.com/Marketing.asp?lang=EN&sub=0429>
- Banff Lake Louise, Canada – Banff National Park:
<http://www.banfflakelouise.com/brand/experiential-positioning>

1.3.2 Commodities versus Brands

‘Commodities bad, brands good.’ This is the traditional thinking in business because commodities are basic raw materials or products that have no qualitative differentiation and are therefore generally low value items. Brands, on the other hand, are premium products that are differentiated in terms of quality and the value that is added by people’s perceptions of their appeal.

The same is true of destinations. The best examples of commoditisation in tourism are beach destinations, which are sometimes sold on the basis of sun, sand and sea, without any other significant defining quality. But there are many countries that can provide sun, sand and sea. So, what makes one more attractive than another? Unless they attempt to differentiate themselves from each other, the cheapest is likely to be the most popular. This leads to discounting and, eventually, commercial suicide.

However, beach destinations that differentiate themselves by conveying a strong sense of place, so that they have a distinctive appeal in addition to sun, sand and sea and could therefore be nowhere else, stand a much better chance of commercial success. They will be able to charge a realistic price and retain visitor loyalty in the face of lower-priced competition, if they have a differentiated appeal and target their markets correctly. Their brand, and a clear sense of what makes them different, is the antidote to the threat of commoditisation. This is about their ability to appeal to travellers on an emotional level. Being warm, sunny and beautiful is no longer enough. Destinations have to express their personality and convey a sense of soul, heart and spirit that engages visitors in order to avoid being viewed as another ‘me too’ destination.

1.3.3 From ‘Destination’ to ‘Place’

From ‘Destination’ to ‘Place’:

- More and more countries are likely to develop **holistic ‘place’ brands** in future, aimed at improving their overall competitive identity, rather than relying purely on a destination (tourism) brand.
- A place brand can increase the **impact and recognition** of a country, region or city amongst consumers.
- This should **never dilute the impact** of the brand in appealing to any one sector, such as tourism or export promotion.
- Rather the aim should be to **identify where the values of each sector** (e.g. tourism, business, education) **can enhance each other** and thereby create more impact for the country (or region or city) as a whole.
- It is about **flexibility, synergy and increased impact**, not reducing the brand to its lowest common denominator.
- Place brands are increasingly being adopted because they provide the **whole country (or region or city) with a competitive identity** and create a wider impact than just a destination brand.

- But **place-branding is not a substitute for a destination brand**. The two can, and should co-exist. Countries need to talk to those who would give them business, whether tourists, inward investors or students in ways that will most appeal to each sector and to each segment within each sector. But the more a country can reflect its brand values consistently across all sectors, the more it will be recognisable to all sectors and the more impact it will have each time it opens a conversation with any sector.

'Destinations' are turning into 'places'. This means that countries and cities are increasingly taking a holistic view of their brand. They recognise that the image of their country or city plays a significant part in influencing people's perceptions of the place as a place in which to invest, live, do business, study and visit. There is, therefore, an opportunity to increase recognition of a place by developing a brand that transcends all sectors and establishes an over-arching competitive identity for the place (see 1.2.5 *Place Brands*).

Olins clarifies how this happens: "All countries communicate all the time. They send out millions of messages every day through political action or inaction, through popular culture, through products, services, sport, behaviour, arts and architecture. Collectively, all these millions of messages represent an idea of what the nation as a whole is up to, what it feels, what it wants, what it believes in. It should be the task of government – with a very light touch – to set the tone for these messages, and to lead by example where appropriate so that something credible, coherent and realistic can emerge."³¹

Of course, the basic conditions ('rational factors') have to be in place before potential investors will consider relocating their business to another city or country (e.g. appropriate labour skills, educated workforce, high productivity, access to markets, etc.); and potential students want reassurance about the quality of teaching on the course they intend to study. However, once these rational factors have been satisfied, the country or city then starts to compete with all other countries and cities that offer similar standards.

What then begins to give it a competitive edge is often the brand, or external perception, of that country or city ('emotional factors'). At this stage it is very often the image of the country or city as an attractive place to live and visit that can make the difference. Quite simply, when all rational factors are satisfied, business investors and students want to live in a nice place. And it is often the image of that country or city as somewhere attractive to visit that is a major factor in defining people's perceptions of it. After word-of-mouth and the inherited image of a place from films, books, news reports, websites and popular perception, its marketing by the tourism authorities is often the next most significant influence on people's perception of a place. Tourism authorities generally spend the most on promoting the image of countries or cities. Even though development agencies may have higher budgets, they tend to work much more 'below-the-line' than tourism promotional bodies and destination management organizations.

This does not mean that destination branding becomes subsumed within an overall country brand, which is less targeted on visitors. A distinctive destination brand that underpins all marketing activities aimed at potential visitors is still essential. Rather it is about seeking synergy between all sectors and, ideally developing an overarching country, city or regional, place brand that mutually reinforces all sectors – tourism, inward investment, exports, education, entertainment, sport. Within this over-arching or umbrella place brand, each sector – including tourism – needs to have the space and flexibility to emphasise its own brand strengths; but these should also be linked to the over-arching place brand values.

At best, this means all sectors working together to identify brand values that can mutually reinforce each other and create a bigger combined impact than they could each achieve individually. At least, it means ensuring that one sector does not convey brand messages that contradict, or threaten to damage, another sector. More often than not tourism brand values will transcend other economic sectors than vice versa

³¹ Olins W. (2007), 'Branding the Nation', in: *On Br@nd*, Thames and Hudson, United Kingdom, p. 169.

(e.g. an unspoilt natural environment will appeal to potential business investors for the weekend leisure opportunities it offers them if they decide to relocate their business, more than biotechnical expertise will have any relevance to potential visitors).

Olins sounds a salutary note with regard to the future: “Managing a branding programme for a nation in the twenty-first century is going to demand a high level of political, managerial and technical skills.”³²

Scotland the brand

In Scotland in the 1990s *Scotland the Brand* was established to develop a ‘country of origin’ brand that united different sectors in promoting Scottish goods and services internationally. ‘Scottishness’ was researched worldwide and a universally strong sense of what it meant to customers was identified.

Scotland’s core values emerged strongly as: **integrity, tenacity, inventiveness, independence of spirit**. These could be interpreted positively as highly aspirational and positive. They transcended different economic sectors and offered particularly valuable associations for attracting tourism and inward investment:

- Americans saw Scotland as reeking of a history they didn’t have, which said as much about Scotland’s romantic heritage as about an inherent work ethic.
- Italians viewed smoked salmon, malt whisky, “tartan cloth” (i.e. kilt) as all very up-market premium products, whose quality rubbed off on the national image – as a producer of quality products as well as a culturally appealing tourism destination.
- The French saw Scotland as a romantic land of swirling mists and haunted castles that reminded them of fantastical tales from childhood, which were rooted in a rich folk culture and classic literature.
- Germans admired the warrior spirit characterised by Scottish clan history, which they saw as a continuous thread represented today in a determined, feisty and straight-talking people. This related as much to the way in which Scots did business as it did to destination appeal.

All of these represented qualities that were significant in appealing to both visitors and potential inward investors.

The New Zealand Way

New Zealand is recognised as perhaps the world’s place brand pioneer and most successful exemplar of nation branding.

The *New Zealand Way* was initially inspired by New Zealand businesses – largely agricultural and food producers – in an attempt to regain sales during a period of economic decline in the 1980s, which was partly stimulated by New Zealand’s loss of preferred trading status with one of its main export markets, Britain, following Britain’s entry into the European Economic Community.

New Zealand exporters recognised the need to develop a strong brand to promote a reputation for quality if a country that was at the other end of the world from its former main export markets was to have a chance of competing on the world stage in this new era. They also recognised the value of New Zealand’s clean, natural environment as a brand asset in promoting natural produce. The *New Zealand Way* was born, driven by the private sector, but as a partnership between the private and public sectors. Its aim was to reposition New Zealand’s international image for quality goods, particularly food and agricultural produce, sports and tourism.

32 Olins W. (2007), ‘Branding the Nation’, *On Br@nd*, Thames and Hudson, United Kingdom, p. 166.

Most significantly, there was a strong understanding of the link between the natural environment and quality produce, which led to a focus on natural, pure and clean brand values. This resonated with customers internationally and helped turn around New Zealand's fortunes in sales of food, drink and natural produce.

But the natural environment also worked wonders for tourism. New Zealand's majestic beauty and unspoilt natural environment, coupled with a passion for adventure and innovation in extreme sporting activities (e.g. bungee jumping, jet-boating, zorbing, etc.), projected a new image of New Zealand as a fresh, crisp, clean, natural youthful adventure destination. This was a far cry from its previously staid and rather old-fashioned image. This was helped by a steady stream of young backpackers who fuelled the demand for a more exciting form of tourism, which led both to a growth in adventure activities and a fresh image of the country.

New Zealand's focus on its natural environment, youthful energy and quality produce seamlessly transcended all sectors, most particularly agricultural produce and tourism. New Zealand's food products and tourism experiences were imbued with these values, which were reinforced through clever marketing and a consistent focus on these values. New Zealand's slogan '100% Pure' may now be more associated with tourism. But, even though consumer protection legislation in several countries prevents it from being used to describe some natural produce and manufactured products, the values nevertheless rub off on all New Zealand produce. In this way, the slogan, and the values it represents, have a much wider impact across different sectors, not just tourism. Such powerful synergy between tourism and other sectors is rare. But the New Zealand example shows how shared values can apply across different sectors as the basis for a strong place brand, as long as they are credible and rooted in reality.

New Zealand's advertising powerfully conveys these values by projecting an engaging youthfulness, an unspoilt natural environment and the prevalence of adventure activities:

- <http://UK.youtube.com/watch?v=eh-0knDpn5g>
- <http://UK.youtube.com/watch?v=R0YakVC8kII>

See also chapter 6 *Branding Strategies in Action*.

South Africa – 'Alive with Possibility'

South Africa is perhaps New Zealand's successor in being one of the world's most visible place brands today. It has effectively harnessed its people's energy and international goodwill to project a land that is 'Alive with Possibility' for inward investors and a destination where the slogan 'It's Possible' invites visitors to explore beyond the traditional tourism honeypots. The strength of the visual expression of the brand and resultant synergy between different sectors is its marketing triumph.

South Africa's success lies primarily in the following main areas:

- South Africa's place branding strategy has been driven by one organization responsible for managing the country's international image, the International Marketing Council of South Africa. This has enabled a momentum to be established across the nation. It has inspired different sectors and organizations to get behind the national brand and interpret it for their own sector; and it has created a central locus for ideas, quality control and information about the brand.
- It has capitalised on its 'newness' following the end of the apartheid, regime and the international iconic status of Nelson Mandela, to project a sense of freshness, energy and dynamism.

- It has single-mindedly exploited the visual power of its vibrant new flag as a symbol of the new South Africa.
- It has achieved extensive cooperation with industries and businesses throughout South Africa to project their 'South African-ness' through various visual applications of the national flag's colours as a symbol of quality.
- It has managed to combine internal marketing with external promotion through the 'Proudly South African' campaign, which is both a quality endorsement aimed at international markets and a rallying cry aimed at inspiring confidence and pride in their own country amongst South Africans.
- The logos for each sector and organization have managed to establish a strong visual synergy, which has a powerful cumulative impact. Based on the vibrant colours of the national flag, they exude a sense of energy and dynamism. And these are values that talk to potential investors as much as they do to sports fans anticipating South Africa's hosting of the 2010 football World Cup. They project a sense of anticipation, excitement and fascination for potential visitors as much as they might inspire wine drinkers to explore new wines from South Africa. Underlying all these products and experiences are the values of energy, dynamism and innovation. They immediately engage with consumers on an emotional level and suggest a national commitment to quality.



For further insight into South Africa's approach to place and destination branding see: www.brandsouthafrica.com.

See also:

- Promoting the **place** ('Alive with Possibility') advertisements:
 - <http://UK.youtube.com/watch?v=qsT57Oc2YoE>
 - <http://UK.youtube.com/watch?v=Df6GHZ7mfx4>
- Promoting the **destination** ('It's Possible') advertisements:
 - http://UK.youtube.com/watch?v=7g_Ccwul8ME
 - <http://UK.youtube.com/watch?v=07ZSqKUJJBX8>

The difference between destination and place brands has been articulated above (see 1.2.5 *Place Brands*). Increasingly countries and cities are developing place brands in order to maximise all economic development opportunities. This does not mean that destination brands cease to exist. Rather, it means identifying the strongest suite of brand values for the nation at a generic level. It also means ensuring that there is a link between the way in which the country is conveyed to potential visitors and the way it is presented to potential inward investors and others. This does not mean a 'one-size-fits-all' approach to branding. Nations must have the flexibility to present themselves in the most appropriate and impactful way to different segments and economic sectors. But the trick is to ensure that the national brand is reflected in the way it talks to each sector and to each segment.

In many countries this usually means leveraging the values from perceptions of the country as an appealing destination and combining these with other iconic elements from other sectors that contribute to a powerful competitive national identity.

This involves all key economic sectors (e.g. tourism, inward investment, exports, education, culture, government and sports) working together to develop a national brand that differentiates the country and agreeing how to use it in a way they can all benefit. Clearly some brand values will be more appropriate for some sectors than others – 'innovative' might be a more important value for potential inward investors, whereas 'adventurous' might be more important for visitors, but they might both be reflections of the overall national brand value of 'independent-spirited'). There should be flexibility for different sectors to increase or reduce emphasis on different brand values, according to their relevance for their individual sector or market segment – rather like dialling the treble and bass on a music system up or down according to taste. At their best, national brand values should transcend all economic sectors, and there should be a clear link between the core national values and the way they are expressed by different sectors.

Example:

Achieving synergy between different economic sectors through the application of national brand values.

A national brand value might be '**independent-spirited**'. This would be expressed differently, through different brand values appropriate to each sector:

- For **visitors** this could evoke a spirited, open and honest people and an opportunity to participate in adventure activities.
- For potential **inward investors** it could refer to innovation in business and a lateral approach to problem-solving.
- For potential **students** it might translate as the embodiment of a tradition of intellectual enquiry and pioneering research.
- For potential **purchasers of products** made in the country it might evoke a sense of fashion and cutting edge design.

1.3.4 Branding in the Digital Age

The future will be interactive and immediate. It is likely that a **digital marketing gulf** will appear between those destinations that embrace the opportunity of Web 2.0, with its associated empowering mindset, and those that do not. Those that do not will not only suffer a disproportionately poor level of awareness amongst potential visitors; they will also lose credibility and risk being seen as **destinations that are off-the-pace**. This could even extend to potential visitors questioning whether they offer modern standards, contemporary facilities and sufficiently customer-responsive service.

However, it is likely that a major task for NTOs will be to establish people's **trust** as an honest information broker, and guide them to find useful information amongst the overwhelming tide of ungraded and unstructured information from unknown and random sources. NTOs can re-establish their value to potential visitors by creating a **virtual information marketplace online** where potential and previous visitors can congregate to share and exchange information, opinions and stories about the destination and find network links to other useful and reliable sources of information.

The digital era has not so much changed the rules, as the **opportunities**, for destinations. The Web 2.0 environment has democratised marketing by empowering consumers; it is immediate; it makes information available to all. But it poses a **challenge** for consumers in selecting the most useful and reliable sources from the mass of ungraded information.

It has created many **more opportunities than ever existed before, at a fraction of the previous cost**, for people to obtain, as well as exchange and create, information on destinations; and for destinations to present their attractions to potential visitors. It has, potentially, marginalised traditional sources of information, or at least vastly reduced consumers' dependence on them, by enabling potential customers (and visitors) to enter into dialogue with each other. It has also enabled NTOs to enter into a dialogue with potential visitors, to understand their desires and obtain immediate feedback in the way that their destination is perceived and performs, as never before.

The Web 2.0 environment has made it **easier for potential visitors to build a picture of a destination**: by obtaining information from people they have never met, as well as from official sources. It also enables them to provide opinions to others worldwide, to exchange photos, videos and create their own stories about a destination for all to see. But it is important to remember that, while communications opportunities have multiplied – and cannot be controlled by official sources such as NTOs – **people's underlying motivation for travel has not radically changed**. People still want to travel for relaxation, to 'get away from it all', to see somewhere different, to experience authentic culture, to discover undiscovered places, to view wildlife, to participate in outdoor activities, to learn a new skill, or just to reconnect with their partner. This means that NTOs need to understand the opportunities that the Web 2.0 environment makes available to help drive visitors to them.

The Web 2.0 environment, while not changing visitors' underlying reason for wanting to travel, has several major **implications for destinations**. These are outlined below.

- NTOs must realise they **cannot control the way their destination is perceived**. NTO marketing communications represent a drop in the ocean of the messages about the destination (as they always have).
- NTOs must change their mindset and work with consumers, who are now empowered to reinforce or contradict a destination's brand image – not just within their own online communities, but also much more widely through **multiple online networks**.

This means, for instance, NTOs welcoming **user-generated content** on their websites by creating an online focal point where potential and previous visitors can cluster to share information on the destination – a sort of **virtual digital marketplace for information exchange**, whereby the NTO creates the marketplace as a recognised point at which the most useful and reliable information can be exchanged, but where potential and previous visitors bring the goods (content) in terms of their opinions, experiences and information to trade or exchange with each other.

See <http://www.communityOfsweden.com>.

- In an increasingly complex digital world where people will have to decide which sources of information to trust, there is an opportunity for NTOs to re-establish a role in providing a **valuable, credible and reliable forum** for potential visitors (as they did in the pre-digital era with very different technology).
- The opportunity for unlimited communication means that, more than ever before, **the destination experience must match the brand promise**. Never before has it been easier for visitors to tell more people about their holiday experience. Visitors who suffer a bad experience can tell the world

about it in an instant. Blogs have provided personal insights to people searching for destination information for some time through random internet searches. 'Twittering' on holiday is not yet an observably significant phenomenon; but is likely to become so. As mobile communications costs come down, barriers to 'twittering' across borders from holiday will reduce: people are likely increasingly to 'twitter' and send 'tweetpics' about the highs and low of their holiday – on the beach, on safari, or on top of a mountain, throughout their holiday.

- This emphasises the need for NTOs to ensure that, in their own and their stakeholders' marketing communications at least, the **destination brand is expressed consistently**. This provides a stable 'flag in the sand' around which all destination stakeholders can rally to present a powerful, positive, and consistent message about the destination in everything they do. It is not about controlling everything they do (which has always been impossible). But it is about ensuring that the communications that emanate from the 'horse's mouth' (i.e. those messages that the NTO and stakeholders can influence) project a consistent and positive image of the destination, its assets and values in this digital world of seemingly limitless perspectives.
- But, perhaps most significantly, it requires a **revolution in the NTO's mindset** in terms of the way it approaches its marketing and engages with its potential visitors. The destination brand, as epitomised by its essence and values, must remain constant (but still with the potential to vary its emphasis on different values for different segments). But the way in which it is communicated through marketing activities must take account of the reality and opportunities of the digital age and Web 2.0 in particular.
- This means **endorsing the way in which Web 2.0 empowers consumers, finding ways of using new applications** to help potential visitors understand the essence of the destination (e.g. through user-generated content on NTO websites and links to other useful sites and networks), and demonstrating through the techniques and communications methods it uses that the destination is forward-looking, customer-oriented and, ultimately, can deliver what visitors expect.

Practical Guide to Branding Strategy

2.1 Introduction

This chapter explains the main steps a destination needs to take in developing a branding strategy. Most of this chapter is devoted to the practical steps involved in the brand development process. It also includes examples designed to illustrate good branding practice and to aid understanding of each stage of the branding process.

2.2 Defining Branding Objectives

Defining brand objectives – Key points

It is important for destination managers to maintain a continual awareness of, and be able to articulate, the objectives of branding the destination, which are:

- to **differentiate** the destination from its competitors;
- to **increase awareness and recognition**, and therefore, memorability of the destination over time amongst potential visitors;
- to create a **positive image** for the destination that makes people responsive to the NTO's marketing message and therefore more likely to visit;
- to give the destination a strong and compelling **brand identity**.

Too often **countries fail to identify their core brand personality** as a result of political pressure, short-term commercial interests, or just because they are caught up in the whirlwind of everyday business. This risks commoditising a destination and leaving it vulnerable to the first waves of a recession. It is therefore important that all stakeholders understand both the **role of a destination brand as a competitive identity** and the need for a single-minded approach based on the destinations' greatest strengths.

This is particularly important for **politicians and tourism businesses** to understand. Their interests are often much narrower and shorter-term than the long-term national perspective required to establish and reap the rewards of a destination brand. They can therefore sometimes consider the single-minded focus required for a destination brand to be too limiting or detrimental to their particular constituents' or business interests. Politicians, in the form of government ministers, are usually the main source of funding for destination brand development and promotion; and stakeholders, particularly in the inbound travel trade, are often the main link between visitors and their experience of the destination brand in real life. Their understanding of the role of a brand and the time it takes to become established is therefore critical.

2.3 Brand Positioning

“...positioning is not what you do to a product. Positioning is what you do to the mind of the prospect”¹

Brand positioning is about understanding what your target markets think of your destination and **ensuring you occupy the most positive position in their perception** compared to your competitors. It is also about ensuring that they understand **what your destination stands for**, what its strengths are and where it outstrips its competitors.

Ideally this position should be capable of being encapsulated in a short, succinct sentence – the **‘party test’** or **‘elevator pitch’**: how would someone describe your destination to a casually interested enquirer at a party, or to someone between floors three and five in an elevator? The ‘positioning response’ must be succinct, clear, ideally visual and differentiating. It should be noted that this is **not about ‘sloganeering’**: it is not a slogan for use with a logo; it is a down-to-earth summation of the way in which you would like people to see your destination.

This may **vary from segment to segment**. New Zealand, for instance might describe itself as ‘the adrenalin sports capital of the world’ to the adventurous youth market, but as ‘a natural paradise’ for those interested in scenery and nature. There are several brand-building models that can help in positioning a brand, including the development of a **‘positioning statement’**. Two of these – the brand pyramid and brand wheel – are discussed in the sections that follow.

2.4 The Branding Process

2.4.1 Overview and Key Steps

This section explains how to develop a destination brand. It sets out the process step-by-step. It includes several models and techniques that are helpful in developing the brand.

The branding process – Key points

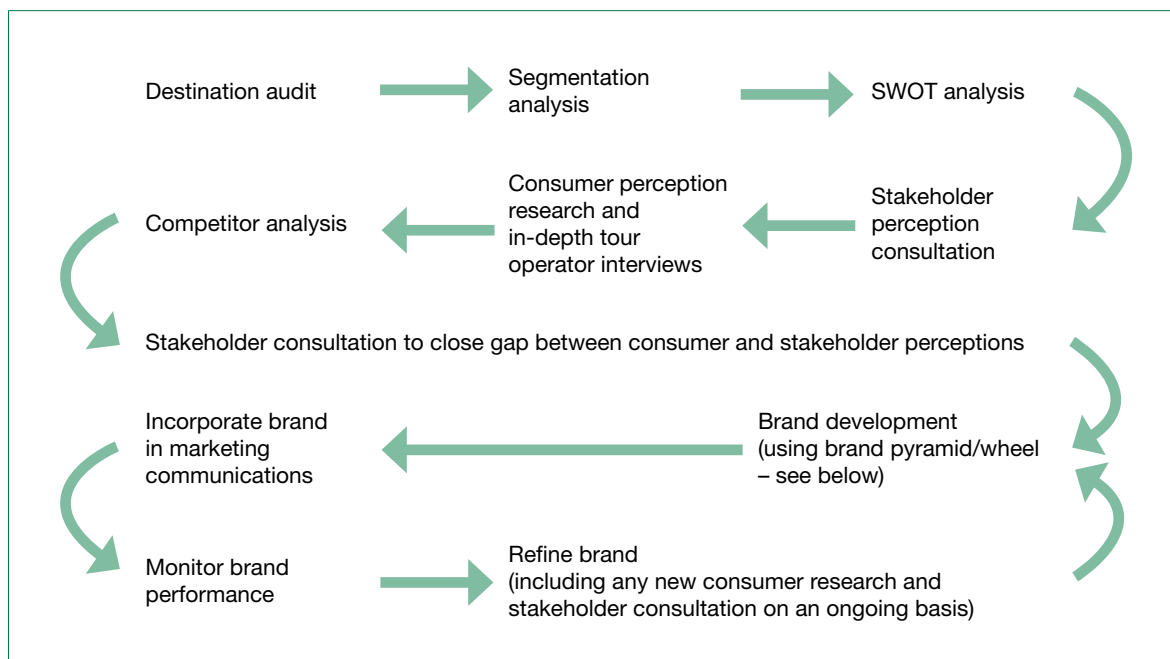
- Destination audit
- Segmentation analysis
- SWOT analysis
- Stakeholder engagement
- Consumer perception research
- Competitor analysis
- Brand-building models
- Integrating the brand into marketing activities
- Global versus local marketing campaigns
- Global brand versus target segments

¹ Ries A. and Trout J. (1981), *Positioning: The Battle for Your Mind*, Warner Books-McGraw-Hill Inc., New York.

It is important to remember that, unlike consumer goods, destination brands are largely inherited, not manufactured. The destination branding process therefore starts by assessing what a **destination’s assets** are and **focuses on how best to present these to each customer group or market segment**.

The branding process should be a **virtuous circle**: the ‘final’ stage, in which brand impact is monitored, informs any refinements that are needed. These are then incorporated in a ‘new stage 1’, in which the brand pyramid or brand wheel are revisited and their relevant elements revised (see 2.4.8 *Brand Building Models*). This information, gathered from monitoring brand impact, is critical in refining the way in which the brand is presented in future. It can also be vital in alerting the brand manager as to when the brand might need to be completely refreshed (see figure 2.1).

Figure 2.1 The branding process



In figure 2.1 we have proposed that the destination audit, segmentation analysis and SWOT analysis follow each other sequentially. In reality they are likely to be much more entwined, and undertaken simultaneously. The reason for this is that the destination’s key market segments will influence the items that are chosen as priorities within the destination audit as well as within the SWOT analysis; and, conversely, the destination’s strengths will, to a large extent, influence the segments that the destination can attract, which it will therefore see as priorities.

2.4.2 Destination Audit

The first step is to undertake a destination audit, and to prioritise your assets. These assets will later be matched to individual segments (see 2.4.3 *Segmentation Analysis*).

Destination audit – Key points

- Undertake an audit of your destination’s core assets.
- Prioritise these assets in terms of those that appeal to your main market segments.

Destination audit – Key questions

- What are the destination's main assets in terms of its visitor appeal?
Think of, for example, visitor experiences, scenery, culture, wildlife, activities, architecture, etc..
- How powerful are these compared to other destinations?
For example, you may have a small ski resort patronised by local people, but is it as large, exciting or challenging as those that attract international visitors in other countries?
- How accessible are these assets/experiences for visitors?
For example, you might have a rich indigenous culture, but if it is not accessible to visitors without them intruding upon local communities, it is not a strong asset from a visitor perspective.

In order of priority, which assets are the strongest and most appealing for visitors?

Note that different products and experiences will appeal to different visitor segments. You should identify your core current and potential visitor segments in order of priority, and then identify which assets appeal to your most important visitor segments. These will be your strongest assets.

2.4.3 Segmentation Analysis

Segmentation analysis – Key points

- Identify your **key market segments**.
- **Prioritise** them.
- Your key segments will form the **main target of the consumer research** you undertake at a later stage to identify how they feel about your destination, as you start to build the brand.

It is important to identify and prioritise the key market segments for your destination. These will drive your brand development. This is because the brand positioning and brand values you select should be those that most appeal to your key market segments (e.g. If one of your destination's greatest strengths is its cultural heritage, then one of your main market segments will be those who are interested in culture. It therefore follows that culture will feature in some form as an important element of the destination brand.).

Knowing your main target segments and prioritising them will guide your consumer research, because these are the people whose opinions about your destination matter most. They are therefore the people whose motivation you need to establish, and whose perceptions will influence the way in which you build your brand.

The way in which you market the destination to each different target audience will vary according to what they find most appealing about your destination. But the destination's core brand values should always shine through all marketing activities to all segments, even if you change the emphasis for different segments.

For a detailed discussion of approaches to segmentation see the ETC/UNWTO *Handbook on Tourism Marketing Segmentation*.²

² European Travel Commission and World Tourism Organization (2007), *Handbook on Tourism Market Segmentation – Maximising Market Effectiveness*, UNWTO, Madrid.

2.4.4 SWOT Analysis

A SWOT analysis should follow the segmentation analysis.

SWOT analysis – Key points

- Identify your destination’s **strengths, weaknesses, opportunities and threats**. This should not be an uncritical list. It should identify and prioritise strengths, weaknesses, opportunities and threats in relation to your key markets within a competitive framework (e.g. a ski resort might be one of your country’s main tourism assets. But if it is not amongst the best in the region, its power as a destination strength will not be great and it will therefore not be a competitive strength in international markets – in which case it should be prioritised accordingly and honestly in terms of its ability to attract visitors in relation to competing destinations).
- Ideally a SWOT analysis should be undertaken for **each key market segment**.
- A **‘master’ SWOT** analysis should then be developed for the destination. This is done by compiling the most competitively significant strengths, weaknesses, opportunities and threats from the SWOT analysis for each individual segment.

SWOT analysis – Key questions

Strengths	Opportunities
<ul style="list-style-type: none"> • What are your destination’s competitive strengths? • Prioritise them – starting with your greatest strength. 	<ul style="list-style-type: none"> • What are the main opportunities for your destination? • Prioritise them – starting with your greatest opportunity.
Weaknesses	Threats
<ul style="list-style-type: none"> • What are your destination’s weaknesses? • Prioritise them – starting with your greatest weakness. 	<ul style="list-style-type: none"> • What are the greatest threats facing your destination? • Prioritise them – starting with the greatest threat you face.

In answering these questions, always consider your destination’s competitive context. You should include only those strengths and opportunities that help give your destination a competitive edge, and those weaknesses and threats that truly affect your destination’s competitiveness. Otherwise your SWOT analysis will be no more than an un-prioritised and unhelpful ‘catch-all’ list of features.

2.4.5 Stakeholder Engagement

Stakeholder engagement – Key points

- **Include key stakeholders from the beginning** of the brand development process.
- **Develop a core group of stakeholders** who will participate in the development of the brand (e.g. steering group) (see chapter 4 *Managing the Brand*).
- **Explain the purpose and value of a brand** to stakeholders, and the importance of their eventual contribution as brand advocates.
- **Consult with key stakeholders** to obtain their perceptions of the destination.

- This is best done initially through **qualitative in-depth** discussions with key stakeholders. This will elicit their strongly held positive and negative views of the destination. Stakeholders, by virtue of their detailed local knowledge, often focus on details that the visitor may never notice. This can divert attention from the issues that matter most to visitors. Research questions should therefore try to focus on the bigger picture.
- Interviewers should be briefed to remind stakeholder interviewees of the **ultimate purpose of this research**, which is to develop a brand that will present the destination in the best possible light in order to attract visitors, and not to dwell on local problems if they are not significant for visitors.
- **Quantitative** methods could also be used to test the extent and relative importance of different stakeholder perceptions. However this is not usually necessary or particularly revealing.
- It is important to remember that **stakeholder perceptions do not necessarily represent visitor's views**. Stakeholders often view their own country quite differently to the way in which visitors perceive it.
- **Keep this core stakeholder group engaged and informed** on progress throughout the brand development process, seeking their input at key stages (e.g. through a brand development steering group, workshops, etc.)
- **Provide stakeholders with a simple, comprehensible toolkit** containing key brand messages that enables them to convey clear and consistent messages about the destination (see chapter 4 *Managing the Brand*).
- **Communicate with a wider group of stakeholders** (e.g. citizens and media) at critical points so that they will understand and, hopefully, buy into and feel pride in the new brand. Ideally they will then reflect the destination's brand values in their own behaviour, as well as become advocates for the brand.
- **Ensure that all stakeholders are engaged with on an ongoing basis and with appropriate messages**. Stakeholders are people who have an interest in the way in which the destination presents itself.
- There are three main groups of stakeholders:
 - **Key influencers and opinion formers** who will be helpful and important in developing the brand. The brand steering group should be drawn from these people (e.g. leading figures in the inbound travel industry, government/ ministry of tourism, and other relevant organizations).
 - **Those with a direct interest in the performance of the destination**, whether in relation to their business, professional or political role (e.g. inbound travel trade, hotels, attractions, transport companies, politicians, regional and local authorities, national, regional and local organizations, such as conservation, arts, cultural and heritage bodies).
 - **Ordinary residents and the media.**

Visitors' perceptions are the deciding factor for any destination. However, it is also important to analyse stakeholder perceptions at the outset, particularly those who receive visitors (e.g. inbound tourism operators, hotels, attractions, etc.). **Stakeholders are people who have an interest in the way in which the destination presents itself.** They comprise mostly people who live in the destination and people who deliver the destination experience to visitors, such as the inbound travel trade, hotels, attractions, transport companies, politicians, regional and local authorities, national, regional and local organizations, such as conservation, arts, culture and heritage bodies, as well as ordinary residents and the media.

Stakeholders have no say in how the visitor thinks. However, if stakeholders do not view the destination in the same way as visitors do, and therefore do not reinforce the destination's brand values through their behaviour when they meet visitors, there is likely to be a **disconnect between visitors' expectations and reality**: the destination's marketing promise will not be borne out in the visitor's experience. And, if stakeholders do not agree with the way in which the destination projects itself, they will be less likely to reflect the destination's brand values in their own marketing communications. This will result in visitors receiving different messages about the destination.

While this may not deter visitors, it could confuse potential visitors as to what the destination offers. And it will certainly result in a lost opportunity for synergy between different organizations that are marketing the country. **Ideally all sectors and all stakeholders who are marketing the country should reflect the destination's brand values in all their own marketing activities to increase impact for the country.**

It is therefore important to **engage with key stakeholders at the outset**. They should be invited to participate in the development of the destination brand from the beginning. In that way they will not only bring a range of different, and often challenging, ideas to the brand development process, but there is also a much greater chance that they will buy into the final brand. And, if they buy into the final brand, there is a greater chance that they will become brand advocates, rather than brand cynics.

"It is important that the brand is close to the people – the residents of the country and users of the brand, because they implement the brand and in that way the brand is not just a symbol but is alive with the people."

Respondent to *Survey of Current NTO Branding Practices* (see annex 1)

Understanding stakeholders' perceptions can help frame some of the next steps in the brand development process. More importantly though, it is important to capture stakeholders' perceptions of the destination, so that the **gap between stakeholder and visitor perceptions** can be identified. This can then, hopefully, be minimised at a later stage. Ultimately the aim is to achieve a consensus between stakeholders' and visitors' perceptions of the destination; otherwise the destination promise that visitors have been led to expect may not be matched by their experience when they reach the destination.

It is important to **understand any difference between stakeholders' and visitors' perceptions from the beginning**. This allows the NTO to take steps during the brand development process to try to bring stakeholders' perceptions closer to those of visitors', or at least to encourage stakeholders to understand the importance of visitors' perceptions.

2.4.6 Consumer Perception Research

Consumer perception research – Key points

- **Research amongst consumers** to understand how people view your destination is one of the single most important steps in brand development. This enables you to understand how your destination is perceived both by people who have visited and those who haven't. It enables you to identify your destination's greatest strengths, its weaknesses and any obstacles to progress.
- **Qualitative research** will reveal most about people's motivation and how your destination satisfies, or falls short of satisfying, this deeper psychological need.
- Consumer **focus groups** usually elicit the best insights.
- Focus on key **target segments**.

- Include both **previous visitors and ‘non-visitors’**. It is equally important to find out why **‘non-users’** have either dismissed your destination or not considered it.
- Probe for **true motivation**. Do not settle for a list of ‘likes’ and ‘dislikes’.
- Appoint an **experienced research agency** with experience of eliciting consumers’ deep-seated motivations, so that can you truly establish their feelings about your destination.
- Ideally **the destination brand manager should observe the early focus groups** (usually discreetly so that he/she does not inadvertently influence discussion), in order to ensure that the research agency probes sufficiently deeply to reveal people’s motivation and goes beyond merely identifying people’s likes and dislikes.
- Interview **outbound tour operators** who sell your destination in key source markets. Tour operators are complementary to, but not a proxy for, consumer research.

Understanding people’s perceptions of your destination can most effectively be done through **qualitative research**, usually in focus groups and in-depth individual interviews. This gives the interviewer an opportunity to probe behind some of the more superficial ‘like’ and ‘dislike’ responses that emerge in quantitative research. It is necessary to dig down and understand the deeper psychological needs and personal motivation that lie behind people’s destination choice.

(For instance a superficial response that a visitor liked seeing wildlife, if merely taken at face value, might lead to the promotion of indigenous wildlife in local zoos or small-scale wildlife parks in the NTO’s marketing materials. Whereas, given the opportunity to probe further, an interviewer might learn that the visitor’s motivation was to see wildlife in its natural habitat, with no other people nearby. Recognising that solitude, space and an unspoilt natural environment are important elements of the wildlife experience for the visitor, would lead towards a greater understanding as to how potential visitors perceive the destination. It would also begin to inform the destination’s brand values, as well as guide the type of tourism product that might be developed.)

Importantly, qualitative research amongst visitors and potential visitors ensures that the NTO sees the customer’s motivation through the customer’s eyes. This helps avoid the all-too-common mistake of interpreting what the customer thinks through NTO eyes.

This research should be amongst **previous visitors** as well as **‘non-visitors’** in your key target segments. This will reveal the gap between perceptions of your destination and the reality. And it will enable you to address any misperceptions as you develop the brand. It might also throw up other obstacles at a very practical level, which need to be addressed for the destination to become more competitive (e.g. difficulty in purchasing your destination through outbound tour operators; product improvement needs in the destination; which destinations are perceived as your main competitors; competitor strengths, etc).

Namibia – The value of listening to both previous visitors and non-visitors

The Namibia Tourism Board (NTB) changed the direction of its marketing, following consumer research in its main international markets (South Africa, Germany, United Kingdom). Instead of focusing so heavily on tribal culture it began to emphasise the emotional experience of desert wilderness.

This was because, while people who hadn’t been to Namibia expressed an interest in experiencing tribal culture, those who had visited the country explained that this was quite an intrusive thing to do. More significantly, those who had visited cited Namibia’s unique, vast and rugged landscape as the country’s outstanding appeal at a very visceral emotional level.

This led not only to a greater emphasis on the soulful experience associated with Namibia's wild, majestic landscape in NTB marketing materials, but also to the use of landscape rather than portrait imagery in brochures and websites produced by NTB and Namibian inbound tourism operators. This simple design technique increased the sense of scenic drama in marketing materials and emphasised the awe-inspiring nature of the destination experience for potential visitors.

Focus groups with previous visitors and non-visitors were instrumental in unearthing this insight. Such an insight would have been unlikely to have emerged without undertaking qualitative research in focus groups, or if non-visitors had not been included in the focus groups.

Qualitative research is best carried out by an **experienced research agency** who will know how to probe to elicit answers to these deeper motivational questions. Techniques might include: testing consumers' reactions to a range of different destinations by, for instance, asking them to describe their feelings about different places; using word association to illustrate their attitudes towards different destinations; showing visual images associated with emotive text to elicit their perceptions about places. Techniques will vary from both country to country and research agency to research agency. What is important, however, is to ensure that the research agency understands the need for, and is capable of eliciting, people's deeper psychological motivation which underpins their attitude to travel. This is one of the first pitfalls in destination branding, where people often fail to elicit consumers' underlying motivational reasoning, often because this need is not truly understood or because it is too difficult.

In-depth interviews with key outbound tour operators should also be undertaken in main source markets. This will provide a complementary, insight into what visitors are looking for in your destination. They will also identify what sells best, as well as obstacles to selling your destination.

However it must be remembered that tour operators represent only those visitors that book through them. They do not represent independent travellers who may only use the internet or book direct. This is particularly important to note for destinations that receive a large proportion of independent travellers.

Outbound tour operators should not be seen as a proxy for the views of consumers themselves. They should be seen as complementing, not replacing, consumer perception research.

This is because:

- tour operators represent only a slice of the market – those who book packages. The more people travel independently to your destination, the more important it will be to capture **independent travellers'** perceptions;
- tour operators will tend to focus on their own particular **customer niche**. They may be unaware of other markets, and therefore of their motivation for travel;
- tour operators tend to focus on products that sell, but will naturally be less aware of the reasons why others do not; and understanding **why some do not sell** could be revealing in terms of developing the brand;
- tour operators are **unlikely to be able to answer on behalf of their clients** about their deeper psychological motivation for travel. This is particularly important, as it is often only at the level of the second or third question in a qualitative research discussion that people's true motivation for travel is revealed;
- tour operators should be able to identify who are your main **competitor destinations**. But they may not always know how clients feel about your competitor destinations in sufficient depth to enable you to develop a clear picture of where your competitive advantage lies.

See also 2.5.2 *Achieving Stakeholder Buy-in*.

2.4.7 Competitor Analysis

Understanding where your destination stands in relation to its competitors is critical. This means assessing what your destination's competitive strengths and weaknesses are against what visitors are looking for.

Competitor analysis – Key points

- Identify the key **motivators for travel** amongst your target segments (see 2.4.6 *Consumer Perception Research*).
- **Plot how your destination delivers** on these motivators versus your competitors. Figures 2.2 and 2.3 illustrate one way of doing this.

Competitor analysis – Key questions

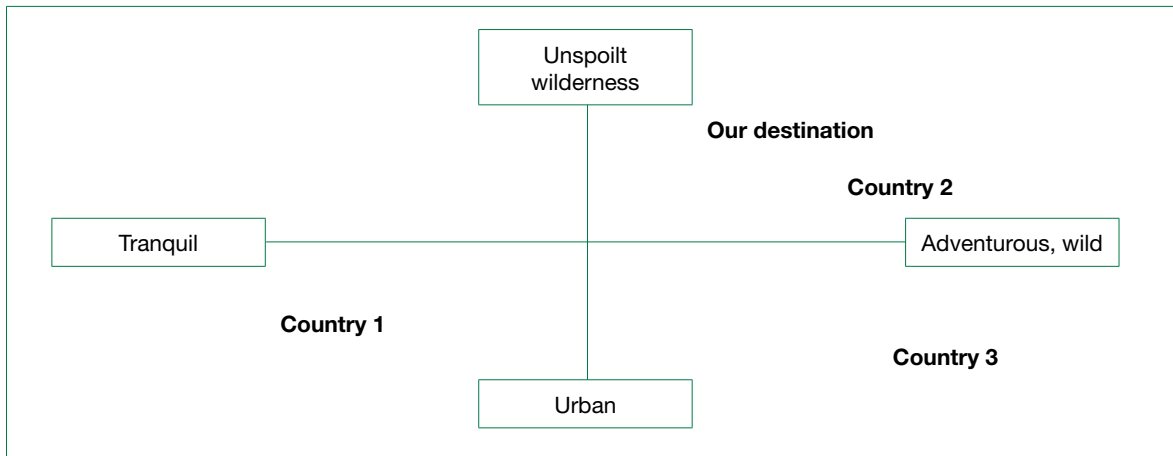
- What are visitors from your core market segments looking for?
- What are your destination's main assets?
- How competitive are they?
- Where does your destination sit in relation to your competitors?

Figures 2.2 and 2.3 illustrate how to plot your destination's competitive position in relation to its nearest competitors. In the first model, figure 2.2, the steps are as follows:

1. We identified a **wild, unspoilt natural environment** and a **sense of adventure** as two important factors that motivate travellers.
2. We used **unspoilt wilderness** and **adventurous/wild** to describe the experience visitors are seeking, which we know our destination can deliver.
3. We then identified the antithesis of these experiences that our visitors are seeking (i.e. **urban versus unspoilt wilderness; tranquil versus adventurous/wild**), in order to help define even more clearly the motivating experience (**unspoilt wilderness and adventurous/wild**). These are neutral terms; they are not negative or value-laden, as their value derives from the way in which each visitor segment perceives them. For instance, 'tranquil' might be an appealing value to people in a different market segment – or even to the same market segment at a different time – who are seeking an escape from their frenetically paced life.
4. We then selected our destination's nearest competitors in these areas.
5. We plotted where each of our competitors sits on each axis in terms of its ability to deliver these experiences.
6. Next, we plotted where our destination sits in relation to our competitors on each axis.

N.B. This is usually difficult to quantify. So this technique is most useful to plot positions of destinations relative to each other, rather than to measure precisely the differences between them. Information on which destinations are our nearest competitors can be obtained from a range of sources, particularly from interviews with tour operators and consumer perception research (see 2.4.6 *Customer Perceptions*), as well as from general market insights and specific market analyses, which many NTOs will already have as part of their ongoing competitor analysis.

Figure 2.2 Competitor analysis – Unspoilt wilderness versus adventurous, wild

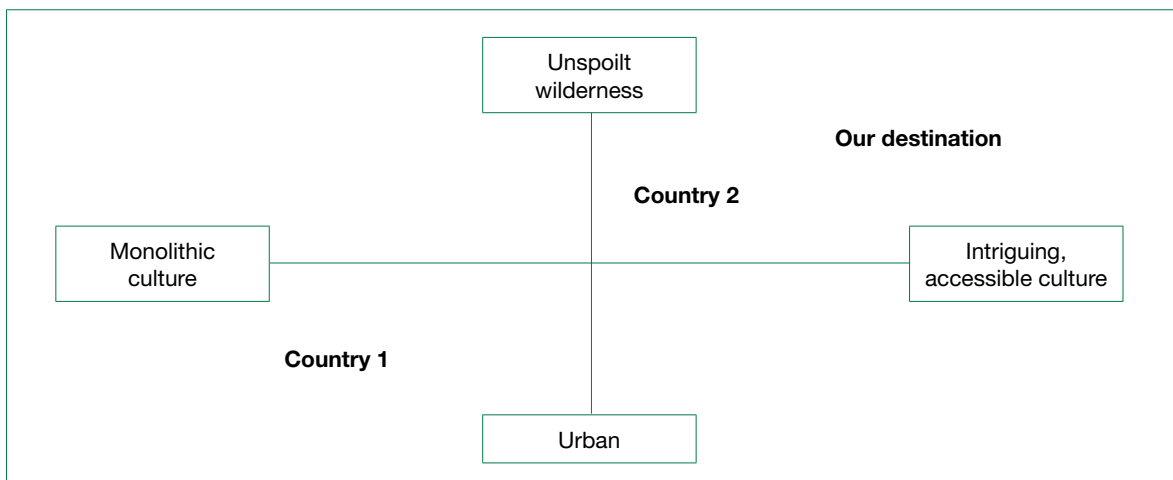


In figure 2.2 above, our destination offers the best **unspoilt wilderness** experience of all three competitor countries; but it is not as **adventurous** or **wild** as Country 2. We would then need to assess how closely our destination competes with Country 2 as an **adventurous, wild** destination before deciding whether we could seriously compete as an adventurous, wild destination. This would determine whether we selected **adventurous** or **wild** as a brand value or not.

You can see that Country 1, being relatively **tranquil** and **urban**, might appeal more to a less active segment, or even to people from the same segment at a different time when they were seeking a quiet city break. Country 2, which is more **adventurous** and **wild**, might appeal to adventure enthusiasts and thrill-seekers; while **urban** and **adventurous/wild** Country 3 might be of more interest to younger clubbers seeking vibrant city nightlife.

However, in figure 2.3, our destination is the clear front-runner in terms of having both **unspoilt wilderness** and an **intriguing, accessible culture**. We can therefore confidently select both **unspoilt wilderness** and **intriguing, accessible culture** as factors that powerfully differentiate our destination from our competitors. That will give us a clear basis on which to develop our destination’s brand values. The steps in developing our destination’s brand values are outlined in 2.4.9 *Brand-Building Models – The Brand Pyramid*.

Figure 2.3 Competitor analysis – Unspoilt wilderness versus intriguing, accessible culture



The above models enable us to identify the core motivators for travel to a particular country (e.g. **unspoilt wilderness and an intriguing, accessible culture**). By plotting different countries’ ability to deliver against each of these motivators, we can assess any country’s competitive strength in relation

to its nearest competitors. This process should be repeated for each major segment in our destination against each competitor country to identify our competitive position in each market segment.

2.4.8 Brand-building Models – Overview

Brand-building models – Key points:

- There are a number of models available for **teasing out the ‘truth’ of a brand**.
- The roles of all brand-building models are similar in that they aim to establish the brand’s core essence, however this is described. It is therefore a matter of **personal choice** as to which one to use.
- The **aim** is to find answers to the following questions on behalf of potential visitors:
 - What are the main things I like about the destination?
 - What sort of place is it?
 - How does it make me feel?
 - How would I describe it in one sentence?
 - What makes it different from all other destinations?
- This should elicit the destination’s **brand essence and values**, which should then be run through all marketing activities by the NTO and, ideally, by stakeholders in their own marketing communications.
- Two of the most common are the **Brand Pyramid and the Brand Wheel**, which are depicted below.

2.4.9 Brand-building Models – The Brand Pyramid

The brand pyramid is a simple tool that builds up a brand logically from an assessment of the destination’s main strengths to a distillation of its essence. There are various forms of the brand pyramid, of which the following are most common.

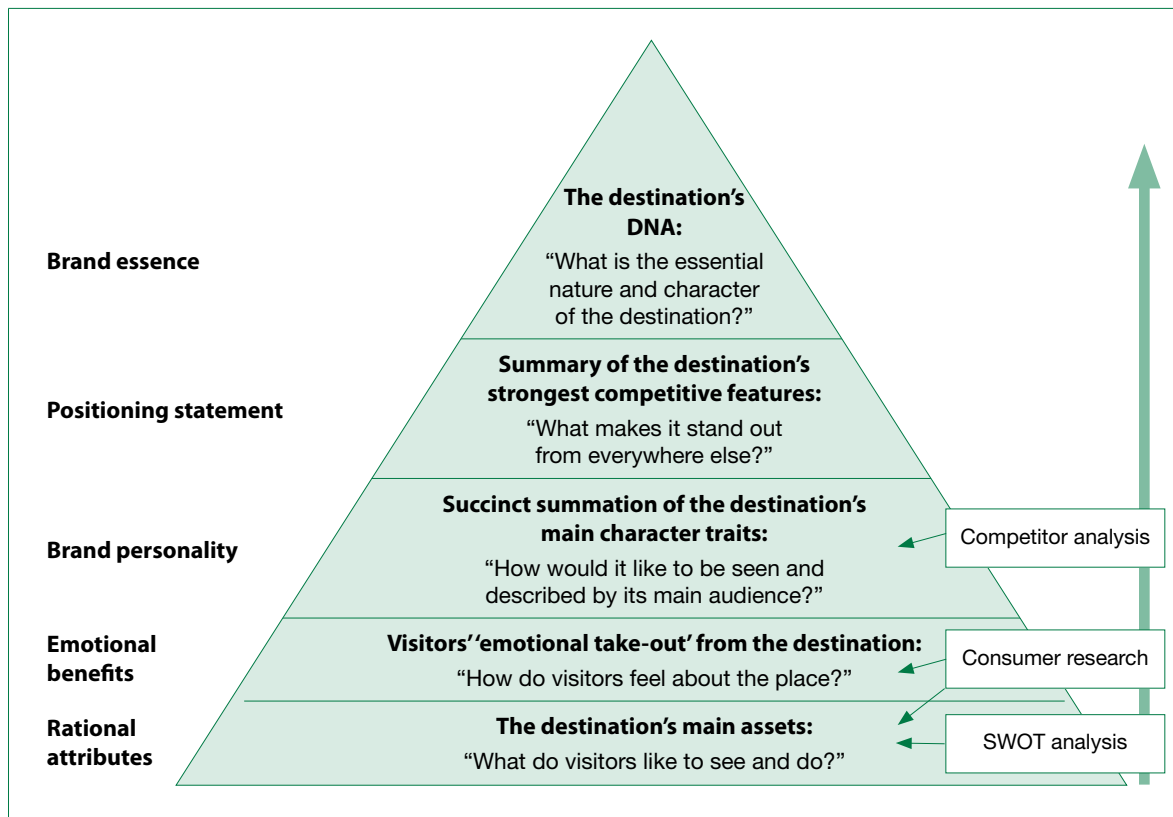
The Five-Stage Brand Pyramid:

The five-stage brand pyramid is the simplest and most concise. It differs from the six-stage brand pyramid in that:

- it combines ‘attributes’ and ‘rational benefits’ in one stage as ‘rational attributes’;
- it includes a ‘positioning statement’ within the pyramid, which the six-stage model does not;
- it combines ‘brand values’ and ‘brand essence’ in one stage.

The pyramid below shows these stages. It also identifies when activities, such as SWOT analysis, consumer research and competitor analysis, should be undertaken.

Figure 2.4 The five-stage brand pyramid



Starting from the bottom and ascending through each of these five stages towards the top:

- **Rational attributes:** The brand pyramid starts by identifying rational attributes, which are the country’s main tourism assets – the things people like to see and do in the country. These would be identified in a **SWOT** analysis (see 2.4.4 *SWOT Analysis*).
- **Emotional benefits:** The brand is then built up by exploring visitors’ ‘emotional take-out’ – the emotional impact it has on them. This is established through qualitative consumer research, which explores consumer perceptions of the destination and their motivation for travel at a relatively deep psychological level (see 2.4.6 *Customer Perception Research*).
- **Brand personality:** The destination’s brand personality is then established following a **competitor analysis**, to identify what is truly unique about the destination (see 2.4.7 *Competitor Analysis*). This represents a succinct summation of the destination’s defining characteristics and reflects how the destination would like to be seen by its key audience.
- **Positioning statement:** A summary of the destination’s strongest competitive features comprises the positioning statement. This functions as the basis that should guide all marketing activity – whether by an NTO, marketing agencies or stakeholders. This should summarise the destination’s strongest appeals, which give it ‘competitive stand-out’.

N.B. The positioning statement is a strategic ‘back-office’ tool. It encompasses the way in which the destination should be projected in marketing communications. But it is **not** a statement that should ever be used in talking to consumers. It is a technical statement that is not sufficiently inspiring to motivate potential visitors; but it should contain all the key elements describing the destination’s competitive position that the NTO and its marketing agencies require to develop powerful marketing communications.

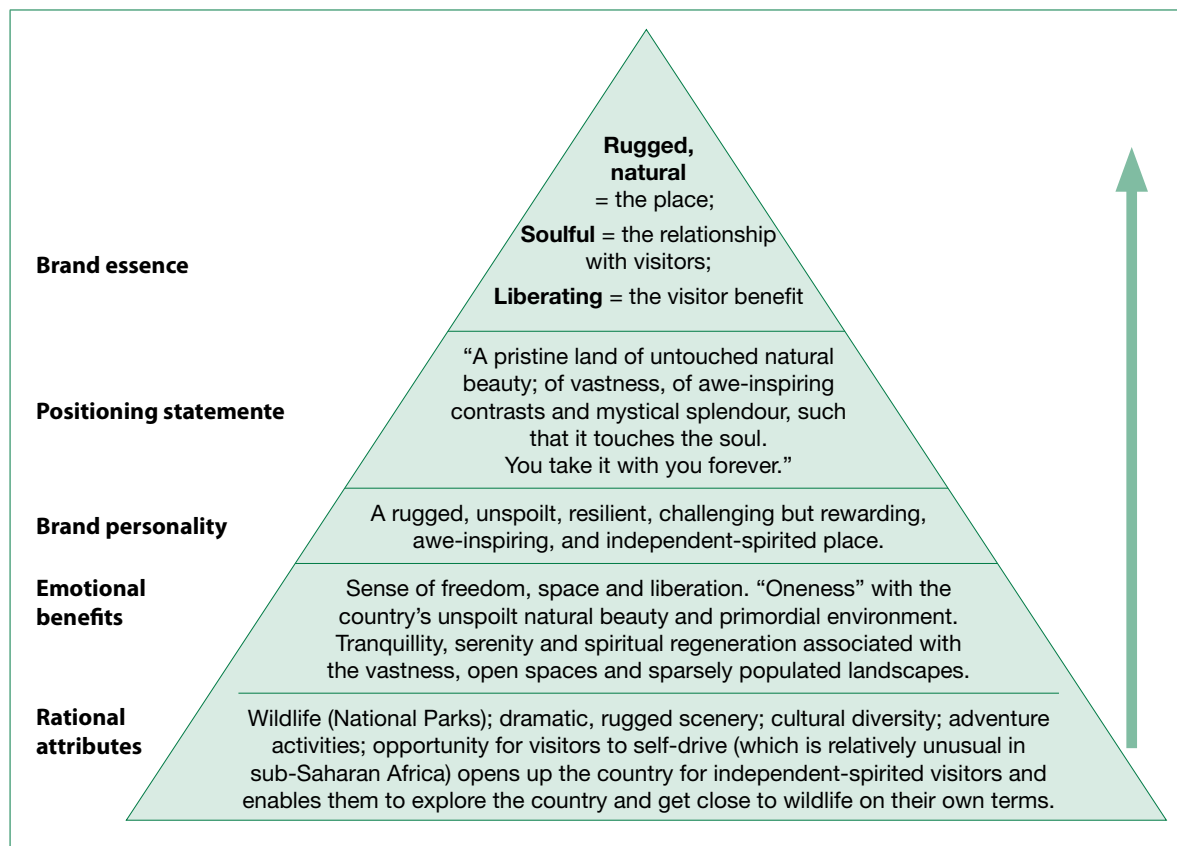
Its job is to guide creative people in advertising agencies, marketing staff within the NTO, and all who market the destination in developing their marketing messages. It should then be possible to check back that the key elements of the positioning statement are expressed creatively in marketing communications.

- **Brand essence:** Finally the brand essence includes 3 to 4 core values that are enduring and which, in combination, comprise the **'destination's DNA'**. These define the core essence of the destination. These are generally single word descriptors (e.g. invigorating, tranquil, passionate, sensual, etc.) They should be as visual as possible. They should be reflected in all destination marketing communications, particularly in the tone of voice and visual imagery used (see 3.2 *Applying the Brand Values – Marketing Communications* for further discussion of how to communicate this).

The brand pyramid below illustrates how these elements have been developed for Namibia.

The brand pyramid in action (1) – Namibia

Figure 2.5 Brand pyramid illustrating the Namibian tourism brand



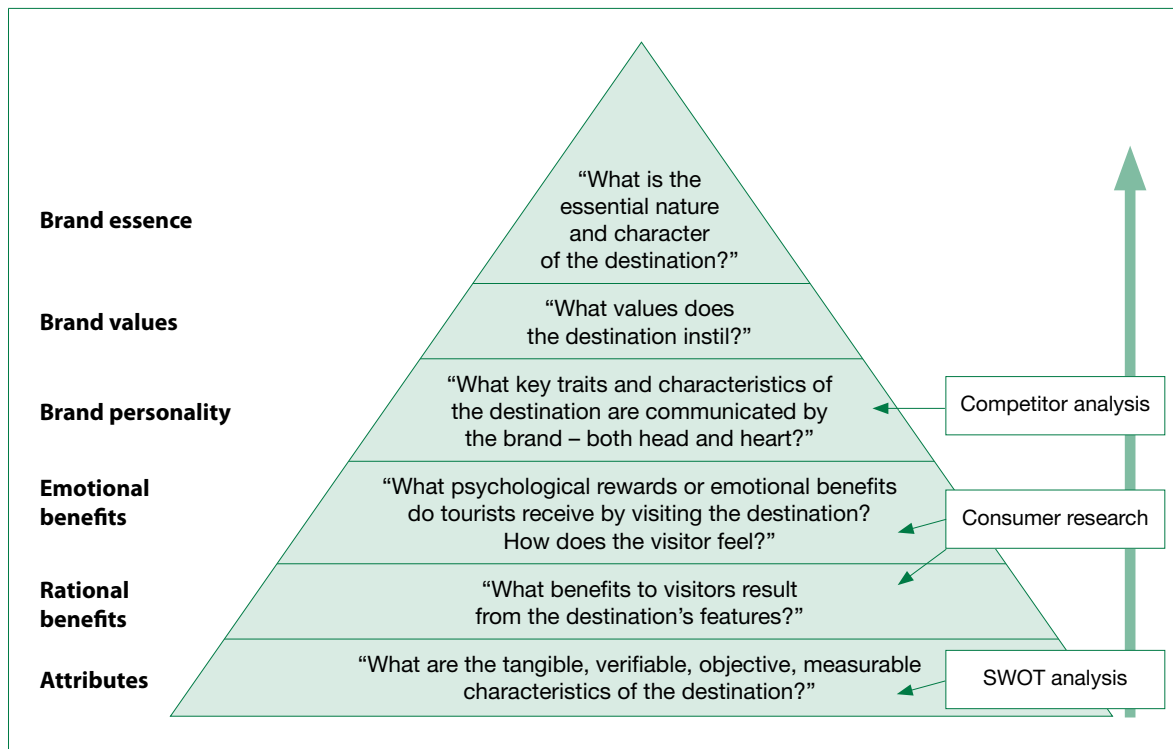
The Six-Stage Brand Pyramid:

The six-stage brand pyramid contains more detail. It differs from the five-stage brand pyramid in that:

- it separates 'attributes' and 'rational benefits' into two stages.
- it does not include a positioning statement within the pyramid. This would be created elsewhere.
- it separates 'brand values' and 'brand essence' into two stages.

The same procedures as used in the five stage brand pyramid are used to elicit the necessary information at similar stages (e.g. SWOT analysis, qualitative consumer research, competitor analysis).

Figure 2.6 The six-stage brand pyramid³



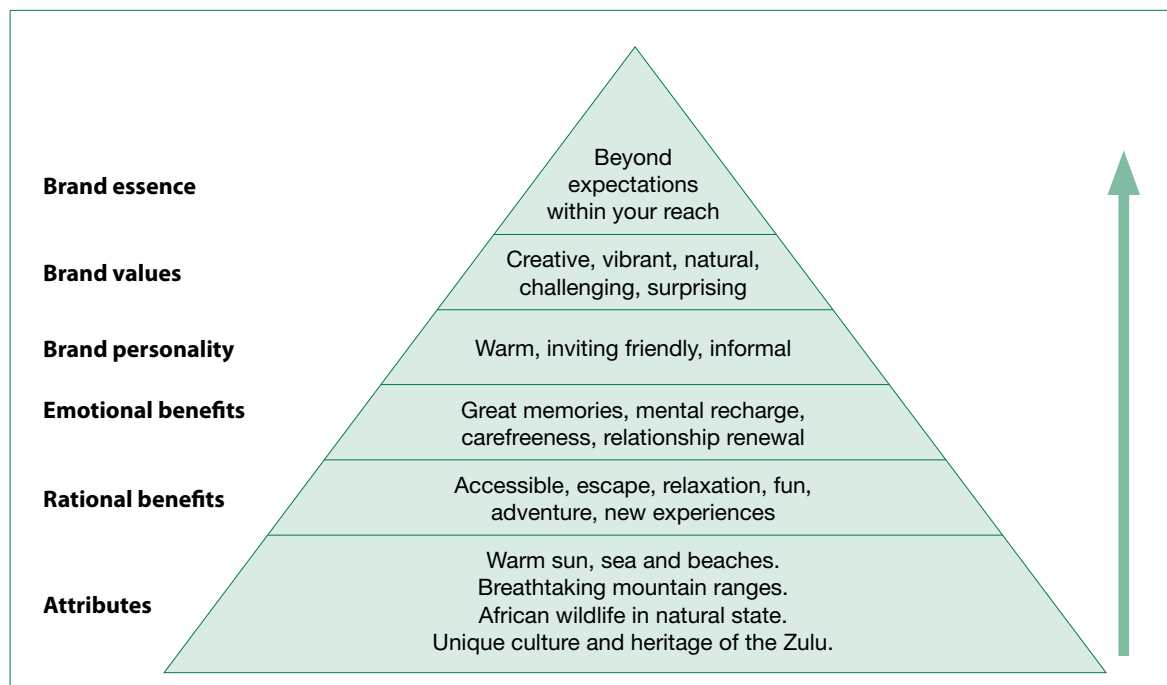
Distinguishing between the brand essence and brand values is sometimes more difficult in the six-stage brand pyramid, as these both relate to the defining characteristics of the brand’s DNA. Sometimes the brand essence is expressed more like a marketing slogan than a neutral essence (as in the Kwazulu-Natal example on figure 2.7). This can be helpful as long as it reflects an enduring essence and is not seen as an ephemeral marketing slogan. Rather like the positioning statement, such a marketing-flavoured brand essence should guide the way in which the brand is presented in marketing communications.

The following example illustrates the six-stage brand pyramid in action for KwaZulu-Natal.

³ World Tourism Organization (2007), *A Practical Guide to Tourism Destination Management*, UNWTO, Madrid

The brand pyramid in action (2) – KwaZulu-Natal ‘Zulu Kingdom’

Figure 2.7 KwaZulu-Natal ‘Zulu Kingdom’ brand pyramid⁴



2.4.10 Brand-building Models – Brand Assets Template

One of the risks in destination branding is that the concept of branding can sometimes seem too esoteric, and therefore irrelevant, to stakeholders. It is important to **demonstrate how stakeholders can apply the destination’s brand values in their own marketing communications**, in order to encourage them to adopt the brand and thereby generate synergy for the destination: the impact of all stakeholders’ marketing activities should be greater than the sum of their individual efforts.

A brand assets template can help bring the brand to life for stakeholders in a practical way. It is useful to think of the brand assets template⁵ as the **link between branding theory and marketing practice**. It is a critical link between the brand at a conceptual level and its implementation in marketing activities by an NTO and destination stakeholders.

It is a **practical reference tool**. Its purpose is primarily to help both the NTO and the destination’s inbound tourism operators understand, at a very tangible level, which products and experiences reflect each of the country’s core brand values. This then enables them to apply these values effectively in their own marketing communications. It also helps the NTO to theme its marketing and use relevant products to convey each brand value in its marketing communications.

It acts as a **continually evolving inventory of products and experiences** (brand assets), which relate to each brand value. Its main use is to help NTOs and tourism operators select the products and experiences for their websites and brochures that most powerfully exude the brand values they wish to convey.

The brand assets template is a simple tool that complements the brand pyramid. NTOs can fill it in with stakeholders; or stakeholders can fill it in on their own. It is a standing **inventory** that illustrates the

4 Seymour, J. (2008), ‘The Role of a Destination Website in the Process of Destination Branding’, in: *Tourism KwaZulu-Natal Occasional Paper*, number 61.

5 Yellow Railroad (2003), *Brand Assets Template*, Edinburgh, United Kingdom.

products and experiences in a destination, which reflect each brand value. This enables stakeholders to relate physical products to brand values. They can then choose which brand values to reflect in their own marketing activities and how to apply them, using visual images of specific products.

It can also act as a **checklist** for the NTO and stakeholders to check that they have included sufficiently brand-resonant products and experiences in their websites, brochures and marketing campaigns. And they can check whether they have reflected the appropriate brand values in the text and imagery they have used to describe these products and experiences.

The brand assets template can also help with **market segmentation**, by enabling destinations to identify which values appeal to which segments. Different market segments respond to different destination appeals. Therefore different brand values need to be stressed when targeting different segments: for instance, adventure sports enthusiasts such as kite-surfers will respond more to a destination that presents itself as invigorating and wild; whereas a honeymoon couple might respond more to the seclusion and tranquil appeal of a remote eco-lodge.

In the example below, we have selected three destination brand values, which might reflect the holiday motivation for an active, young, adventurous segment: ‘natural’, ‘soulful’ and ‘invigorating’. We have then selected a range of products and experiences and put a cross against those brand values that each product delivers.

For example, staying in a remote eco-lodge is considered both ‘natural’ and ‘soulful’, while hiking in rugged mountains and kite-surfing are perceived to be ‘natural’ and ‘invigorating’.

Table 2.1 Brand assets template

Products and experiences	Brand values		
	Natural	Soulful	Invigorating
Products			
Spa resort		X	
Remote eco lodge	X	X	
Experiences			
Candlelight dinner on a desert island		X	
Hiking in rugged mountains	X		X
Kite surfing	X		X

2.4.11 Brand-building Models – The Brand Wheel

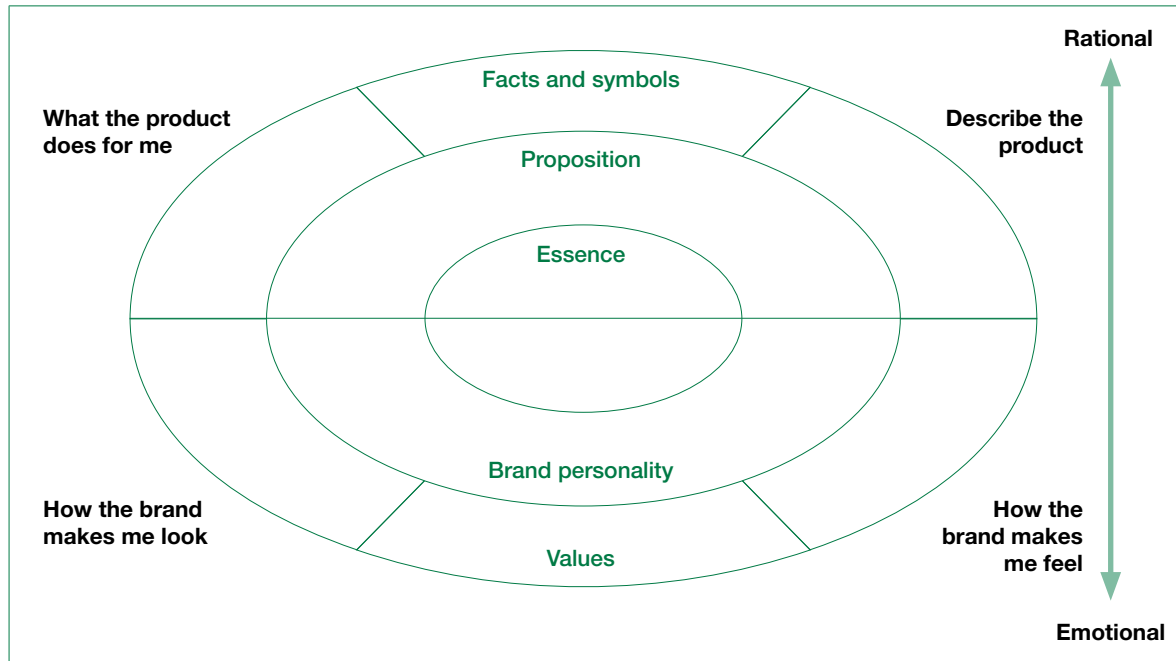
A brand wheel contains considerably **more information than a brand pyramid**. It enables destinations to include products and experiences that substantiate, or reinforce, the brand. In a way it combines the brand pyramid with the brand assets template. It is therefore an alternative to the brand pyramid/brand assets template combination. The brand wheel combines all core information about the brand in one diagrammatic model. It demonstrates the linkages between each layer of the brand, which makes for easy cross-referencing.

A brand wheel allows the brand manager to **simplify the individual qualities that add up to reflect the brand** and what it stands for. An interesting way to think of this process is to imagine the brand manager as a scientist and the essence of the brand being its DNA. Creating the brand wheel, allows us to unlock that DNA, and see how the brand is made up.

As described above, a brand contains both **rational and emotional elements**. Rational attributes define a product and explain what that product does for the consumer. Emotional factors identify how a brand makes someone look, and how it makes them feel about choosing it.

Bringing these elements together allows us to drill down into the core of the brand so we have the following information in our grasp:

Figure 2.8 Brand wheel



The brand wheel – Key elements:

- **Values:** What the brand stands for.
- **Personality:** How you wish to be perceived by your audience (which must be credible and deliverable).
- **Benefits:** The tangible benefits you can deliver for your consumer.
- **Substantiators:** Facts about your brand that support your proposition. These may vary from market to market and segment to segment.
- **Essence:** The true character of the brand.
- **Proposition:** What can we say about this brand that makes it unique and better than its competitors?

What is the difference between brand values, brand essence and a brand proposition? The **brand essence** is the most important piece of the jigsaw, in that it is a distillation of all that creates the brand. The brand essence is created by looking at the values that shape a brand's personality, and translating these often human characteristics, into a word or words that describe quite succinctly how a place feels and communicates itself to us.

Distilling brand values into an essence

One example might be a country, such as Germany, whose values describe it as being 'smart', 'efficient' and 'well-organised'. These might lead to an essence that summarises these values or characteristics as being simply 'professional'.

Similarly, a nation that is perceived as 'adventurous' by visitors and 'innovative' by inward investors might summarise its essence as being 'independent-spirited'.

The **proposition** refers to how we will go about promoting the essence. The proposition is what is given to the marketing communications experts in the form of a creative brief. It is similar to the positioning statement in the brand pyramid. They will turn it into actual words and language that can be readily understood by the consumer, and persuade them to reappraise the product in whatever way they are being asked to interact with it.

Who creates the brand wheel?

Creating a brand wheel is not normally something that is created by the destination brand manager in isolation. It is, of course, driven by the destination brand manager, but it should also involve research amongst a wide variety of stakeholders and, as identified above, qualitative consumer research. Typically this would include those who have a vested interest in the success of the destination, as well as consumers who might be attracted by it. Getting as much background research as possible makes the 'truth' of the brand more accurate and therefore more likely to succeed. (see 2.4.5 *Stakeholder Engagement* and 2.4.6 *Consumer Perception Research*.)

Recruiting external consultants, who are experts in bringing these different factions and factors together, is advisable. This also allows for an impartial 'helicopter view' untainted by politics and internal tension.

The brand wheel in practice – Scotland

Figure 2.9 Visit Scotland brand wheel⁶

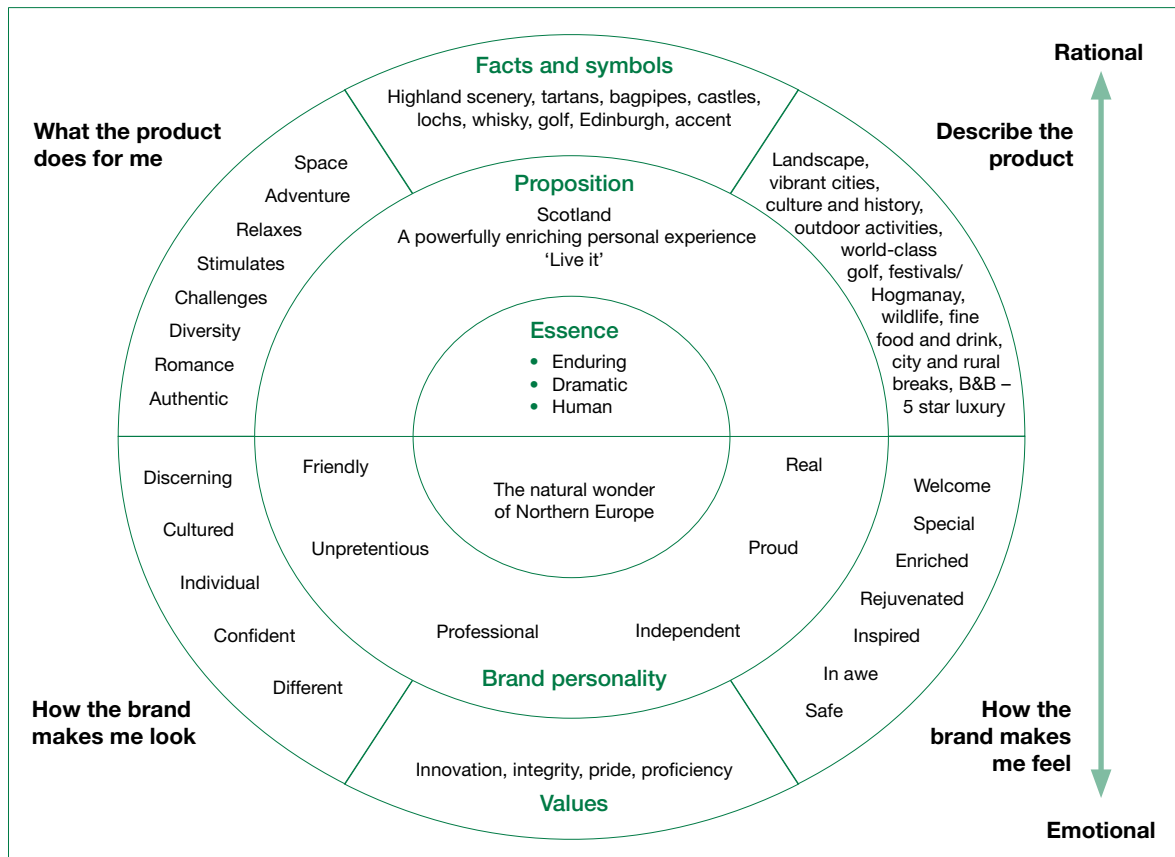


Figure 2.9 shows a brand wheel that was created for VisitScotland. It has been used successfully for a number of years. Note the various strata of communication:

6 Courtesy of Visit Scotland, Edinburgh, United Kingdom.

- **Essence:** *The natural wonder of Northern Europe.*
- **Proposition:** *A powerfully enriching personal experience, and the campaign slogan, 'Live it,' which although not in itself descriptive of the destination, reflects a popular trend amongst NTOs exhorting visitors to immerse themselves in the destination.*

A brand wheel requires a bit of time and effort to create, but it should act as a relevant blueprint for a decade or more. It provides a clear starting point for writing a succinct creative brief for a marketing agency, which is an essential basis for effective marketing.

2.4.12 Brand-building Models – Brand Wheel versus Brand Pyramid and Brand Assets Template: Which One to Use?

The choice between using a brand wheel or a brand pyramid combined with a brand assets template is really one for each individual brand manager, according to whichever they feel more comfortable with.

The **brand pyramid** separates the development of the brand itself from the brand's core products and experiences, which are included in the separate **brand assets template**. The **brand wheel**, on the other hand, contains examples of the brand's core products and experiences in one diagrammatic model. The main differences are:

- The **brand pyramid** takes two stages to do what the brand wheel does in one. It provides a cut-down overview of the main elements of the brand, which some people may find more accessible. But it requires the addition of the **brand assets template** to provide examples of brand-resonant products and experiences.
- The **brand wheel** provides a more comprehensive overview of all elements of the brand, by including examples of brand-resonant products and experiences. However, it doesn't enable stakeholders to populate the wheel with their own brand-resonant products in the way that the **brand assets template** does.
- The **brand pyramid** separates products and experiences that substantiate the brand from the development of the brand itself. On the one hand, some might feel that the omission of brand-resonant products and experiences from the brand pyramid makes it less clear than the **brand wheel**, which includes them. On the other hand, a separate **brand assets template** provides an opportunity for the NTO and stakeholders to populate the brand assets template with an unlimited number of brand-resonant products and experiences. It also enables each stakeholder to tailor the brand assets template to his/her own business.
- The **brand assets template** is a limitless inventory of products and experiences related to each brand value. This can be useful when working at a more detailed level with stakeholders on their own brand.
- In the **brand wheel**, brand-resonant products and experiences are contained in the outer ring. Clearly it would be confusing to include too many products and experiences in the outer ring, as this would overwhelm the core elements of the brand that are contained within the inner rings (i.e. essence, personality, proposition). However, the **brand assets template** could also be used to complement the brand wheel, if desired, in order to capture a larger number of brand-compliant products and experiences.
- In short, the **brand wheel** enables the whole 'brand story' to be viewed at one glance; whereas the **brand assets template** separates the main brand-compliant products and experiences into a separate stage, which complements the **brand pyramid**. The brand assets template is however limitless and more flexible, particularly when working with stakeholders to develop their own brands.

These advantages and disadvantages are set out in the table below.

Table 2.2 Brand wheel versus brand pyramid and brand assets template

	Advantage	Disadvantage
Brand wheel	<ul style="list-style-type: none"> • ‘At a glance’ overview of all core brand information. • Includes examples of brand-resonant products and experiences. • Comprehensive. 	<ul style="list-style-type: none"> • Possibly confusing – too much information included. • Limited room for expansion – cannot be used as an inventory of all brand-compliant products and experiences in the way that the brand assets template can. • Cannot be used/populated by stakeholders for their own business brands.
Brand pyramid and brand assets template	<ul style="list-style-type: none"> • Brand pyramid provides a simple overview of the brand’s main elements. It is therefore perhaps more accessible and easy to understand. • 2-stage approach (brand pyramid plus brand assets template) permits a separate focus on brand development, followed by inclusion of products that substantiate the brand. • The brand assets template is a limitless ‘inventory’ of brand compliant products related to each brand value. • The brand assets template can be adapted and used by stakeholders for their own products. 	<ul style="list-style-type: none"> • Does not permit an overview of all core brand information at one glance.

2.4.13 Integrating the Brand into Marketing Activities

Integrating the brand into marketing activities – Key points

- Integrating the brand into marketing activities means being clear about the **strategic message** that needs to be communicated. The strategic message is based on the destination’s brand values. The impact it has on the target audience depends on creative marketing execution.
- It is important to recognise that the **strategic message and creative marketing execution** are not the same thing. The strategic message needs to be interpreted and projected through creative marketing execution in order to excite its target audience.
- The destination’s brand values, which underpin the strategic message, should **run through all marketing activities**, no matter how small.
- This can be achieved by reflecting the destination’s brand values in:
 - The **imagery** that the NTO chooses to use (e.g. in websites, brochures, advertising and marketing campaigns).
 - The **tone** used to describe the destination (e.g. in websites, brochures, advertising and marketing campaigns).

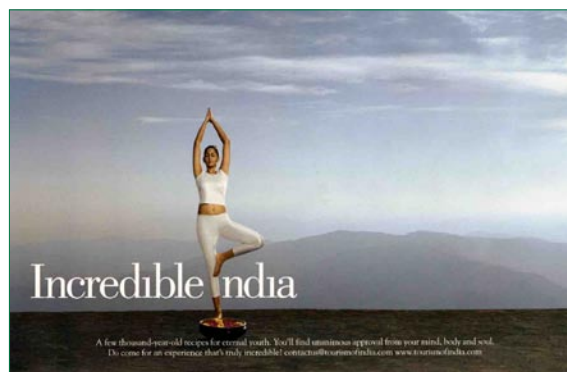
- The **marketing techniques** used (e.g. traditional media versus ‘guerrilla’ marketing; use of user-generated content on websites, etc.). For instance, if a destination wishes to promote itself as somewhere that is innovative and appealing to independent-spirited people (such as ‘early adopters’ or ‘destination pioneers’), it might consider using unorthodox marketing techniques and use media in unexpected ways, in order to project its brand values. Of course this type of unorthodox approach is only merited if the marketing reaches a sufficient number of people in the destination’s target market segments.
- The **experiences** that travel writers, tour operators and travel agents are exposed to on familiarisation trips to the destination. These should, of course, also mirror the visitor experience and not be exclusive to priority audiences such as travel writers, tour operators and travel agents; otherwise the destination will fail the credibility test. If the visitor doesn’t experience what was promised, then the brand could suffer lasting damage, as visitors return disappointed and tell their friends.

Branding is not just about high profile TV and press advertising. In fact that is the tip of the iceberg and is merely one way of projecting a destination’s brand values. Branding is much more important than that. This is good news for all NTOs, particularly those with limited budgets, because they can still brand their destinations effectively without spending on high cost advertising campaigns. As has been explained above, the brand is about the essence and core values of a destination – what makes it unique, distinctive and different from all other destinations. This is its DNA.

So, once the brand essence and values have been identified, the NTO needs to ensure that they run through all marketing activities. This is quite simple, but it requires creative flair and persistence.

The advertisements below illustrate how destination brand values have been incorporated into marketing campaigns.

North East England’s award-winning *Passionate People, Passionate Places* campaign shows how its brand values of passionate people and intriguing history have been creatively interpreted to bring the area to life. This works as both a place and a destination brand message.



India’s spiritual, sensual and exotic values are clearly evident and effectively conveyed in this advertisement from its *Incredible India* campaign.

Norway’s powerful natural values, epitomised in its slogan “*Powered by Nature*”, communicate themselves strongly to the reader in this dramatic advertisement.

And **Australia** projects itself as an antidote to stress, conveying its ability to refresh the soul through tranquil imagery, within a vast natural landscape (<http://www.australia.com/campaigns/walkabout/int/themes/come-walkabout.htm>)



Also see 3.2 *Applying the Brand Values – Marketing Communications.*

Strategic message versus creative execution

It is important to differentiate between a destination’s strategic message, which is based on its brand values, and its communication through creative execution: clever creative execution will ensure that the strategic message makes an impression on its audience.

For example, **Sweden** wished to promote Are/Oresund as world-class skiing and skating destinations. This was the strategic message.

They did this through a *Fit for the Winter Games* campaign, which featured ironic ‘mockumentaries’ – humorous mock documentaries – addressing the fact that they had failed three times to win the bid for the Winter Olympic Games. This was the communications message, executed in a cleverly creative way to maximise impact amongst its target audience.

2.4.14 Global versus Local Marketing Campaigns

One of the most challenging questions for many people is: **“How can a destination’s core brand values run through its global marketing campaigns while still appealing to a wide mix of different segments, with different motivations for travel, in different countries?”**

Debate rages from time to time amongst NTOs about whether it is better to run **global or local brand marketing campaigns**. Some feel that global campaigns risk diluting the brand by reducing messages to a lowest common denominator, while others consider local campaigns to be so diverse that they dilute the overall brand message.

As ever the truth lies somewhere in between these two perspectives. Neither is necessarily better than the other and both have advantages and disadvantages. In order to assess their relative merits it is first important to understand the definitions of ‘global’ and ‘local’, and to consider how they might be applied.

‘**Global**’ generally refers to a campaign that is developed by the NTO head office and distributed internationally in the NTO’s key markets. This can be press, TV or radio. It may be ‘topped and tailed’ with local contact details and a local language voice over, if a TV or radio campaign. The advantages are primarily:

- lower production costs by being produced centrally;
- assured brand compliance by virtue of control by head office brand manager;
- often the necessary skills reside in head office and are not evenly distributed around the NTOs key markets.

The most common form of global campaigns are TV campaigns, largely because of the high cost of production. A centrally produced campaign with a limited number of core creative treatments can be rolled out cost-effectively in several markets around the world.

'Local' refers to campaigns that are entirely devised in the local market place. Their advantage is that they specifically target each local market individually, using the most appropriate messages and media to which each market will respond best. However the disadvantage is that they cannot achieve the economies of scale (e.g. in TV advertisement production) that can be achieved by a centrally produced campaign.

However, there is a third way, which combines the best of both worlds – **global and local**, sometimes referred to as **'glocal'**. This combines the advantages of central production and provides leeway for local targeting. The brand campaign is produced centrally (thereby ensuring economies of scale and retaining core brand values), with input from key markets (thereby ensuring locally targeted messages). This enables enough footage to be shot for all markets for each to select the most appropriate mix of images and creative messages for their individual markets. The core brand message is thereby retained consistently in all campaigns, but appropriately targeted to local markets.

2.4.15 Global Brand versus Target Segments

One of the concepts people often find most difficult to grasp is how a global brand can live within diverse marketing campaigns targeting different market segments in different countries: **How can you target individual market segments using a global brand?**

The answer is really quite simple: some of the **global or 'umbrella' brand values should always be reflected in the local campaign**, so that it is clear which country this is; but local campaigns must target each individual segment with the marketing messages and creative treatment that will appeal most to each segment.

It is important not to lose the link to the destination 'umbrella' brand in local marketing campaigns; but it is also important that local marketing campaigns are free to breathe and can use the messages to which individual segments will respond best. At its heart this is largely a **distinction between branding and marketing**. The brand should run through all marketing communications in the most suitable way for each segment; but the way in which it is interpreted creatively in marketing campaigns will vary from segment to segment.

Ultimately, no matter how different the marketing imagery and messages for each segment, they must all be identifiable as **emanating from the same destination**. And it is the incorporation of the destination's brand values that will ensure this. These can be 'dialled up or down' according to their resonance for each individual market and market segment. This is a significant challenge for creative agencies.

2.5 The Challenges

This chapter summarises the key challenges in developing and effectively applying a destination brand. Some of these have been described above within the context of the step-by-step branding process.

Here they are highlighted as issues that pose a significant challenge to developing a successful brand. They are therefore explored here in greater depth, with occasional case studies to illustrate how some NTOs have successfully addressed these challenges.

The focus in this chapter is on providing suggestions on how to address these challenges successfully.

Key challenges

- Understanding visitors and non-visitors;
- achieving stakeholder buy-in to the brand;
- brand architecture;
- stretching the brand through partnership;
- user-generated content and social networking: threat or opportunity;
- brand coherence: image without cliché;
- branding on a budget;
- brand lifespan.

2.5.1 Understanding Visitors and Non-visitors

The importance of consumer research to understand how actual and potential visitors perceive the destination is addressed in section 2.4.6 *Consumer Perception Research*.

Understanding visitors and non-visitors – Key points

- **Qualitative perception research** will reveal people's motivation for travel.
- Probe beyond the first response to understand **deeper motivation**.
- Find out what **'non-visitors'** as well as **'visitors'** think.
- Focus on **key target segments**.

2.5.2 Achieving Stakeholder Buy-in

Achieving stakeholder buy-in – Key points

- **Involve key stakeholders and residents from the outset** in developing the destination brand, so that they feel they own it.
- Explain in accessible terms **what a destination brand is and why it is valuable**.
- Explain clearly and in non-patronising terms **how stakeholders and residents can play their part** in promoting the destination through their own behaviour.

Avoid terms such as 'brand-compliant behaviour', which is exclusive, jargonistic, and suggests a cloned populace. Rather, give examples of what different visitors are looking for in their holiday and how residents might make them feel welcome. For example, small gestures, such as daily weather reports in mountainous hiking or coastal sailing destinations, can help reinforce the destination's active character, as well as the hospitable nature of its people.

- **Share customer insights and perceptions** of the destination with stakeholders, so that they see their home through visitors' eyes.
- **Provide examples of how residents might reflect the brand** and encourage them to use their initiative in communicating with visitors. These do not need to be large gestures or involve major changes in behaviour.

For example, during the American Society of Travel Agents' convention in Glasgow in 1987, several taxi drivers mounted a bowl of pan-drops (Scottish peppermint candy) on their dashboards, which they offered to visitors. A small gesture perhaps, but nevertheless, because it was so unusual in such an everyday environment, coupled with Glaswegians' renowned friendliness and humour, it had a disproportionate impact in communicating the city's core values of friendliness and hospitality to convention visitors.

- **Maintain communication with stakeholders** as the brand progresses (e.g. through regular briefings, meetings, conferences, via the media and online through an intranet or extranet site).

Some of the greatest risks posed to effective destination brand development come from well-meaning, but non-marketing-literate, people. The reason for this is that sometimes stakeholders are unwilling to accept the need to distil the destination's appeals down to a simple essence that is comprehensible to outsiders. A **strong single-minded proposition** is one of the fundamental principles of destination branding success.

A strong single-minded proposition is easier to grasp and more likely to be **noticed by busy people**, when presented in marketing communications. This does not mean that this one message represents the entirety of a destination. It is merely a symbolic 'hook' with which to attract attention and inspire recognition. It operates at a level of intense international competition amongst many other destinations. The diversity and rich texture of the destination can be explained later in other marketing communications, once people's attention has been caught. But, if their attention has never been caught, then the chances of them ever noticing the diversity and rich texture of the destination are minimal. Leading with the destination's strongest brand appeal for each segment is therefore essential. But leading with diversity and detail will ensure the destination is confusing, does not stand out, and it will remain confined to oblivion.

However, for many people who have a strong interest in the destination, a single-minded proposition can appear too simplistic. Politicians and government ministers, for example, might want to see a much more diverse brand message in order to appear to be all-inclusive and embrace their constituents. Specific businesses might feel that the strong brand proposition does not represent their particular business sector (e.g. a hang-gliding business, a 5-star spa resort and a city museum might find it hard to find common cause with each other). It is therefore important that the **role and value of branding is explained to all key stakeholders** so that they understand and buy-in to the destination brand and can explain it to their constituents and customers. This involves also explaining how the destination's diversity and individual business interests can still be represented in the NTO's subsequent marketing materials, even if they are not encompassed in the brand proposition itself.

It is reassuring to note that **most NTOs** who responded to our survey (see annex 1 *Current NTO Branding Practice*) do **involve stakeholders** in the development of their brand.

Stakeholders can make or break a brand

- In 2000, the Norwegian Tourist Board (NTB) embarked on a new destination brand for **Norway**. A massive programme of communication was led by the NTB managing director to explain the project to stakeholders throughout Norway. However, within three years the project was abandoned. One of the reasons to which its failure was attributed was that, while there had been extensive communication and several large tourism companies were involved, the project was universally seen as an exclusively NTB project. This meant that, when criticism grew, there were few powerful supporters, the NTB became marginalised and the brand was perceived to be a waste of public funds.⁷
- Conversely, when **Australia** embarked on the development of a new destination brand after the 2000 Sydney Olympic Games, and in the wake of the SARS (Severe Acute Respiratory Syndrome) and 'bird flu' epidemic in Asia and 9/11 terrorist attacks in the United States of America, the brand achieved almost universal acceptance amongst Australian stakeholders.

The difficult global conditions following these crises, coupled with euphoria following the successful hosting of the Olympic Games might have had something to do with this success. Also, this was more about refreshing than radically changing the Australian brand. However, there was one other significant factor that was different in the process undertaken by Australia from that undertaken by Norway: The Australian Tourism Commission (now Tourism Australia) led the rebranding exercise. But they began by involving key stakeholders in senior positions at national and state level in all sectors. This included government ministers, state officials, and trade, arts and sports organizations, as well as non-tourism businesses and, of course, tourism businesses. Consequently senior decision makers and opinion formers across all major sectors, and organizations concerned with the international image of Australia, were involved as participants from the outset. This meant that they not only understood the process, but that the chances of their buying into it were greatly enhanced.⁸

Similarly, it is important to achieve **residents' buy-in** to the way in which their home is being portrayed externally and internationally. Sometimes residents do not see their home in the way that visitors do. If residents buy into the destination brand values, then there is more chance that their behaviour will reinforce the brand in the eyes of visitors (see 3.3 *Living the Brand Values – Behaviour*).

Residents' buy-in can also lead to a greater sense of **local and national pride**, which, in turn, is more likely to inspire residents to treat visitors in a way that reflects the destination's brand values. All of this takes considerable planning and effort to achieve, as well as charisma and persistence by brand champions (see 4.7 *Brand Champions*).

See also 2.4.5 *Stakeholder Engagement*.

7 Rainisto S. and Moilanen T. (2009), *How to Brand Nations, Cities and Destinations – A Planning Book for Place Branding*, Palgrave Macmillan, Basingstoke, United Kingdom.

8 Ibid.

2.5.3 Brand Architecture: The Relationship with Sub-national and Supra-national Brands

Sub-national and sub-regional branding – Key points

- All parts of the country should appear linked in some way. They should visibly **share the same DNA**.
- This is achieved by **reflecting some of the national brand values in sub-national brands**.
- These national values can be selected, or **dialled up or down** by sub-national brands, according to their resonance amongst individual market segments.
- But **sub-national brands must also be distinctive**. They should have the flexibility to differentiate themselves from each other.
- Like children in a family, **sub-national brands should all be quite distinctive, but bear some resemblance to the parent national brand**. For example, Lisbon and Porto should look and feel Portuguese, not Spanish, by conveying at least some of the Portuguese national brand values. Equally they should appear as quite different 'Portuguese places'.
- Generally, **the closer the target market, the more resonance a sub-national brand will have**. Conversely, the further away the target market is, the more sub-national brands will rely on the national brand as their way into that market.
- Often the greatest opportunity for sub-national brands lies **within national brand marketing materials, such as brochures and websites**: sub-national brands can present themselves as distinctive, while benefiting from the market penetration and distribution achieved by national marketing campaigns.

Brand architecture: Overview and main principles

Brand architecture is perhaps perceived as one of the most difficult branding concepts to understand. It is in fact quite simple. It is about the relationship between national and sub-national brands. At its simplest it refers to the synergy that is achieved when sub-national (including city) brands are clearly related to the national brand and obviously **part of the same 'family'**. The national brand is reinforced by sub-national brands, when they reflect one or more of the national brand values in their own brand. And, conversely, the sub-national brand leverages recognition from its connection with the national brand through demonstrating shared values. In other words, Lisbon should always look Portuguese, not Spanish; so should Porto. But Sevilla and Valencia should always feel distinctly Spanish.

It is also important to recognise that reflecting national brand values in a country's brand architecture **does not mean that all parts of the country should look the same**. Quite the contrary: the whole purpose of branding is to differentiate one destination from another. This applies as much to sub-regional destinations within the same country as it does to the country when it is competing with other countries for visitors.

Sub-regional destinations must have the **flexibility to differentiate** themselves from each other; otherwise the destination will seem one-dimensional and bland. Sub-regional destinations should add strength and fascination as part of the jigsaw that makes up the national brand, while at the same time clearly sharing the national brand's DNA.

But how can sub-regional destinations be both different and look part of the same country?

The answer lies firstly in identifying a link between the brand values of the country and the sub-region; and secondly in the creative expression of their respective brand values. And, when the sub-region markets itself in more remote markets where it is less well-known, it will be more important to stress the shared values with the national brand, so that it can lever recognition from it. Closer to home, the sub-region can afford to stress its individuality to a much greater extent.

As a general rule, **the less well known and further away from home the market, the more important the national brand is**, because potential visitors will just not have enough awareness of the country's sub-national brands – unless they are internationally iconic, such as Paris, Rome, Tuscany, California etc. Conversely, the closer the market is to home (e.g. domestic or international markets with direct air/sea connections), the greater chance sub-national brands will have of achieving recognition. This is when sub-national destinations have an opportunity to compete for visitors using their own brand identities.

However, the extent to which sub-national brands can effectively promote themselves internationally **depends very much on existing awareness amongst people in the target market** (e.g. Provence may have a strong resonance amongst French domestic travellers, Dutch and British visitors, but limited awareness amongst US, Japanese or Russian visitors). And some sub-national destinations may be well known in niche markets, but relatively unknown in the wider world (e.g. Margarita Island, Venezuela, might be well known amongst windsurfers worldwide; and Reggio di Calabria might appeal directly to the Italian Diaspora in the United States of America).

Even if they do not have sufficient awareness in international markets, sub-national brands can still add to the overall destination offer in the country's brochures and websites. Once people have been attracted to the country and are prepared to investigate holiday possibilities in more depth, there is an **opportunity for sub-national brands to present themselves**. And when they do, they should present themselves as distinctive and different parts of the country. For many sub-national brands, this is where their major opportunity of creating impact and attracting international visitors lies – through a strong presence within national marketing materials. This guarantees a reasonable level of distribution for sub-national brands and enables them to 'piggy-back' on the national brand's ability to penetrate international markets. There is a valuable synergy in this approach: the national brand benefits by strengthening its offer through the presence of sub-national brands; and sub-national brands achieve greater distribution and market penetration than they could otherwise afford on their own.

The table below illustrates how a **sub-national** destination, KwaZulu-Natal, attempts to differentiate further between **sub-regional** brands within KwaZulu-Natal, while still retaining a link to the core sub-national Zulu Kingdom brand.⁹

9 Seymour, J. (2008), 'The Role of a Destination Website in the Process of Destination Branding', in: *Tourism KwaZulu-Natal Occasional Paper*, number 61.

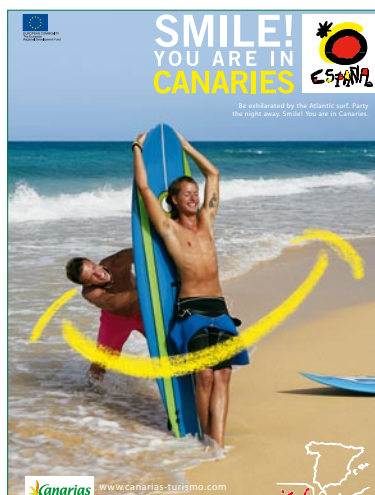
Table 2.3 KwaZulu-Natal – Zulu Kingdom Brand Positioning

Sub-regional brand	Pay-off line/slogan	Experience
Durban	Playground of the Zulu Kingdom	Urban vibe, beach, fun, sport
North Coast	Jewel of the Zulu Kingdom	Lifestyle, pristine beaches
South Coast	Paradise of the Zulu Kingdom	Family beach holiday, family fun
Ukhahlamba/Drakensberg	Soul of the Zulu Kingdom	Real wonder, adventure, scenic beauty
Elephant Coast	Untamed spirit of the Zulu Kingdom	Culture, wildlife, sea, adventure
Battlefields	Legends of the Zulu Kingdom	Heritage
Zululand	Heart of the Zulu Kingdom	Culture and heritage
Pietermaritzburg and Midlands	Capital of the Zulu Kingdom	Country, lifestyle, scenic beauty, heritage

Clearly, each of these sub-regional destinations would still have to develop the details of their own brand by going through the brand development process articulated in 2.4 *The Branding Process* above using a brand-building model to define their own unique competitive positioning and brand essence.

The synergy that is achieved through a coherent system of brand architecture is firstly achieved by projecting shared **brand values**, whereby sub-national brands reflect the most appropriate values from the national brand that their sub-national brand also possesses. These may not always be exactly the same brand values, but they should flow from the national brand values and be clearly related to them.

Secondly, the 'family' connection that links the brand architecture can be achieved through the way the values are expressed in **imagery, tone, or creative treatment**. This is evident in the unifying use of the 'Smile' device and the consistent use of the Spanish sun logo designed by Miró, el sol de Miró, in Spain's family of national and sub-national brand advertising:



...or in the use of a **definitive colour**, such as Holland’s uncompromising use of the national colour, orange:



Holland’s cultural brand value is also reflected in the advertisements for different cities (Amsterdam, The Hague) above through subtle and amusing visual references to famous paintings by famous classical Dutch artists (Van Gogh’s Sunflowers and Vermeer’s Girl with a Pearl Earring).

The ‘family’ connection that links the brand architecture can sometimes be expressed visually through **logos**, which clearly relate to each other through shared visual or textual elements.

Perhaps one of the most unifying logos for a destination and its sub-brands is the inclusion of a country brand identity (logo) in the sub-national destination’s own marketing communications:

The ‘Rendez-vous en France’ logo is included in all French national and sub-regional destination advertising (e.g. France, Paris, Dordogne, etc.), as well as in several commercial operators’ campaigns (e.g. ferry companies). It even adorns the advertisements of France’s overseas territories (*departements*) and semi-independent territories, such as Tahiti.



Sometimes the national flag, or a variation of it, performs this role within sub-national brand logos: Lucerne reinforces its Swiss location, and therefore values, through inclusion of the Swiss national emblem in the city's logo:



Some sub-national destinations, and particularly cities, create a strong link to their national parent brand through inclusion of the **country name** in their logo. Glasgow and Zurich have cleverly managed to leverage impact from the national brand in this way, while at the same time creating a clear identity of their own. As distinctive cities in what are internationally perceived as primarily rural countries (Scotland and Switzerland), they have both leveraged impact from, and added texture to, the image of their countries.

However, in both Glasgow's and Zurich's cases, they only achieve real impact if the audience already understands and appreciates the values associated with Scotland and Switzerland, as they rely heavily on their parent national brand for positioning.



It is important to stress that these visual relationships between sub-national brands and the national brand are not enough on their own. They must be based on a **shared set of brand values**, or clear links between sub-national and national brand values. Expressing these shared brand values creatively is a challenge for NTOs and their creative agencies.

'Attack and slipstream' branding is a technique that can link less well-known sub-national or sub-regional destinations with a stronger destination. This is more commonly undertaken by regions than by nations: weaker sub-regional destinations ('slipstream' destinations) leverage the values of a stronger destination ('attack' destination) within their region by association with the stronger brand: the weaker destinations are pulled along in the slipstream of the 'attack' brand.

This operates best as a marketing technique, whereby the 'slipstream' destinations are included in the 'attack' destination's marketing materials (such as websites and brochures), which lead with the 'attack' brand. This enables the 'slipstream' destinations to penetrate markets on the back of the 'attack' brand, which might not otherwise have been possible. Nevertheless, if executed effectively, the values associated with the 'attack' brand can rub off on to the 'slipstream' destinations by association with the 'attack' destination. In essence it involves a very simple approach, as illustrated by the example below.

Attack and slipstream branding in England's Lake District

This concept has been used quite effectively in England's Lake District, where the Lake District is the well-known destination, but where places on the periphery of the Lake District are relatively unknown and attract far fewer visitors.

The Cumbria Tourist Board (which covers England's Lake District and a considerable region beyond it) used the Lake District as its 'attack brand' in marketing materials, but it also included places around the Lake District's periphery, which were associated with particular themes.

Consequently, peripheral destinations not only achieved greater distribution and market penetration by being associated with the stronger 'attack brand' of the Lake District, but they also benefited from their association with the Lake District by being seen to share some of the Lake District's brand assets and values.

Supra-national and pan-regional branding

Supra-national and pan-regional branding – Key points

- Supra-national and pan-regional brands operate well at a **political** and **administrative** level, but have little value in destination branding, with a few notable exceptions.
- Supra-national branding can work where countries are **quite similar, relatively small, and generally relatively unknown, undifferentiated or quite far from the target market.**
- **Joint marketing** between countries at a supra-national or pan-regional level – which must not be confused with a unified approach to supra-national or pan-regional **branding** – can deliver significant economies of scale. This can be highly effective in terms of increasing overall market penetration and impact, improving purchasing power, and reducing costs.

Supra-national and pan-regional destination brands are few and far between and generally less impactful. This is because they encompass too many disparate countries that are themselves quite distinctive. Finding shared brand values that are genuinely meaningful to the potential visitor for, say, Europe, southern Africa or Southeast Asia, is close to impossible. They tend to lack cohesiveness, involve too many stories and too many stakeholders. This generally doesn't add up to a sufficiently clear competitive identity or to a strong impact on potential visitors.

And there is always a risk that the pan-regional brand is dominated by one of the more powerful and distinctive countries within the grouping.

There are two main **exceptions**:

1. **Supra-national brands** do have a chance of impact where some of the following conditions exist:
 - The countries are quite similar (e.g. they share certain appeals such as culture, topography, etc.);
 - they are relatively small;
 - they are relatively unknown, or undifferentiated in the eyes of, the target market;
 - as a general rule, the further away the market, the more chance the supra-national brand has of being seen as coherent and therefore of achieving more than the countries could individually achieve in that market. This is particularly relevant for long-haul visitors, who often combine several countries, which they may perceive to be relatively similar, in one trip;

- the supra-national brand acts as an introduction to a relatively unknown area for long-haul travellers;
- the region has an umbrella identity already, which is better known than the individual countries.

Supra-national brands can work where the regional brand has a strong umbrella identity that is better-known than the individual component countries

The **Caribbean** is almost as much an aspirational concept as a geographic definition, particularly in Europe. It can therefore lend credibility and a certain caché to even the most unknown of Caribbean destinations.

Even though the Caribbean represents a wide variety of destinations – from the Spanish colonial architectural legacy in Cuba to scuba diving in the Caymans, to the tranquil luxury of Barbados, and from rainforest and idyllic beaches to semi-arid and volcanic landscapes – all destinations can leverage value from their position in the Caribbean.

This geographic and conceptual positioning provides a positive platform from which the smallest, least-known Caribbean island can introduce itself to the market. It is then up to individual Caribbean destinations to establish their own individual identities in the eyes of their own particular target markets.



Supra-national brands can work in long-haul markets, where the individual destinations are relatively unknown:

For example, in **India** the promotion of **brand Europe** works to a degree. For many Indians, who have not visited Europe, Europe is an aspirational trip. It is seen as cultural, historic, clean, beautiful and relatively uncongested. The concept of 'Enchanted Europe' sums up ideas of old world charm and modernism.

However, in practice, the imagery most closely associated with Europe as a holiday destination for many Indians is the natural beauty, fresh clean air, lush green landscapes and snow-capped mountains of Switzerland, followed by London and Paris.

The dominance of Switzerland as the epitome of Europe is largely a result of Bollywood studios frequently using Switzerland as a (usually romantic) film location, in contrast to the hot, congested, heavily populated life of much of metropolitan India.

In such a case other European countries can leverage the brand values associated with the dominant brand, Switzerland; but only if they can deliver against Indian travellers' expectations. Other European countries may not have such high mountains or lush green meadows; but if they can still deliver an experience that satisfies Indians' desire for scenic natural beauty, culture and uncongested space, they will both benefit from and add to perceptions of the European brand in Indians' eyes.

- Thematic branding** can work across a region, where the product offer and visitor appeal is relatively similar in all countries or regions (e.g. hiking in the Balkans, sailing in the Caribbean, culinary tour of Southeast Asia)

The **Baltic states** are an example of supra-national branding that works in certain markets. Their historic cities, which represent their main tourism appeal, have enough in common to unify their product offer as a themed historic 'old town' brand in certain markets. Their relative similarity in terms of landscape, proximity to each other and their relatively small size reinforces this. And they are all accessible within a few days, which fits into the time that many visitors have for a holiday.

Where a country is not particularly well-known, it can sometimes aid consumer recognition and begin to define itself by **leveraging brand values associated with the wider region** within which it sits. But this will only work if the values associated with the wider region are sufficiently positive, strong and widely recognised.

There is, of course a risk inherent here, that the individual country never emerges from the region's shadow. Ideally this is a technique that a lesser-known country would use to break into the international tourism marketplace. However, it should use this opportunity to build its own differentiating values so that it can eventually emerge with a distinct identity that clearly sets it apart from its regional competitors. Eventually it needs to achieve an effective balance between projecting its own identity and leveraging the values of the region so that both work in its favour.

Malaysia has successfully leveraged the wider values associated with Asia to reflect its cultural, culinary and topographical diversity, through its slogan "Malaysia – Truly Asia". This, of course, only works for those who have a reasonable understanding of Asia's cultural and scenic diversity and regard these in positive light.

Conversely, in some cases, a supra-national perspective can also sometimes convey a **negative association**. Unfortunately, this is often beyond the control of individual destinations:

Simon Anholt argues that **Africa** suffers from '**continent brand effect**'.¹⁰ Knowledge of individual African countries is quite limited outside Africa, with some notable exceptions, which are mostly established tourism destinations or recognised as significant regional economies (e.g. South Africa, Kenya, Morocco, etc.). Outside Africa, people's perceptions of lesser-known African countries therefore tend to be largely informed by negative news reports about famine, disease, corruption and conflict rather than by people's direct experience.

Even well-meaning, charitable efforts to remedy the African deficit, such as Live Aid concerts for Africa, have tended to reinforce perceptions of Africa as a doomed continent. "...Brand Africa, with its simple message of ongoing catastrophe, is promoted with skill, dedication, creativity and vast financial and media resources by aid agencies, international organizations, donor governments and, most prominently, by aid celebrities like Bob Geldof and Bono."¹¹

Consequently the dominant perception of lesser known African countries is one of disaster and risk. While this might induce sympathy, it effectively precludes them from most people's consideration as potential holiday destinations. Worse still, it affects these countries' ability to compete in all other economic sectors:

"Because there is so little public awareness and knowledge of the individual countries, every country ends up sharing the same reputation. Even a relatively prosperous nation like Botswana

10 Anholt S. (2007), 'Brand Africa – What Is Competitive Identity?', in: *African Analyst*, Volume 2, Issue 2 (Online), available: <http://www.earthSpeak.com/Download%20articles%20Dec%2006/Simon%20Anholt%20African%20Analyst%20Brand%20Africa%20article%20July%202007.pdf> (31-03-2009).

11 Ibid.

ends up sharing perceptions of violence with Rwanda, of corruption with Nigeria, of poverty with Ethiopia, and of famine from Sudan.”¹²

This ‘continent brand effect’, Anholt argues, emphasises the need for individual African nations to develop strong brands of their own, in order to counteract these negative associations: “It is Brand Africa that defines the brand images of each country, but it should be the other way round: Africa should be the summation of those individual national reputations.”¹³

Marketing versus branding at the supra-national or pan-regional level

However, in terms of **marketing rather than branding**, there is certainly value in working together at a supra-national or pan-regional level. Joint marketing promotions can increase overall impact and increase buying power (e.g. a European supplement in a United States newspaper, a southern African section in a European trade show, a Southeast Asian travel fair). But co-operative marketing of this nature, which is primarily driven by a highly pragmatic desire to stretch resources, should not be mistaken for co-branding.

Such regional joint marketing activities tend, however, mostly to be one-off initiatives. This is because most countries are competing with each other and pursuing their own highly focused marketing strategies. Opportunities where they can achieve synergy – whether in terms of shared costs or greater impact – and still retain their own brand image are relatively few and far between, compared to their need to establish their own identity and fight for visitors.

2.5.4 Stretching the Brand through Partnership

Stretching the brand through partnership – Key points

- Unlike commercial product brands, which risk becoming devalued if used by others, **a destination brand increases in value the more it is used by other ‘suitable’ organizations** – the more it is used by different stakeholders, the more visible it will be; and therefore it will have greater market penetration and awareness.
- The most powerful way of stretching a destination brand is by **persuading suitable partners/stakeholders to convey the destination brand values** in their own marketing communications.
- **Identify key stakeholders** who would be suitable and prepared to incorporate the brand in their own marketing communications.
- Consider appropriate **non-travel** partners as well as those in the tourism industry.
- A **destination logo** (as distinct from the NTO corporate logo) can be useful in stretching the brand through its usage by stakeholders in their own marketing communications.
- Stakeholders’ usage of a destination logo needs to be carefully controlled through **licensing** for authorised users only.

Destination brands are usually devised and driven by NTOs. But, if they are used only by NTOs, their impact will always be sub-optimal. NTOs need to **extend the usage of the destination brand by suitable brand partners** (e.g. airlines, ferry companies and tour operators, government ministries, foreign embassies, national institutions – such as heritage and conservation organizations – development

¹² Ibid.

¹³ Ibid.

agencies, parastatals and appropriate private sector businesses). There are not only compelling business reasons for stakeholders to endorse and use the destination brand, but, importantly, their usage of the brand increases impact and awareness of the destination by achieving much greater visibility than the NTO could afford on its own.

Deciding **which partners to permit to use the brand** is important. Many NTOs allow any reputable business or organization that sells or promotes the destination to use it. Others set up a more rigorous quality control system to ensure that they are part of a relatively exclusive 'club', more akin to the way in which commercial companies assiduously protect their brand.

So, which approach is best?

The answer lies somewhere in between these two approaches. Since the main aim of an NTO is to spread awareness of the destination and attract visitors, it is clear that the wider the reach of the brand the greater chance there is of achieving this goal. The more that businesses and organizations, who are marketing the destination or selling its products, reflect the destination's brand values and look as if they come from the same place, the greater the impact will be for both the destination and each individual product. Clearly there needs to be some quality control, as there is a risk that unsuitable products or unregistered businesses could damage the brand by adopting it. Consequently, the NTO should establish a brand approvals or licensing committee that reports to the brand manager, to authorise the use of the brand.

But what part of the brand are we talking about permitting others to use?

In this context there are two elements of the brand that are important:

- The **brand values**, which it is difficult to prevent any organization from using.
- A **logo or brand design** (e.g. a specially designed treatment of the country name, etc.), which can be copyright-protected and licensed for use by authorised users or, if appropriate, members of a destination brand 'club' or restricted stakeholder group.

Ideally **all stakeholders should be encouraged to convey the destination's brand values in their own marketing**. But only appropriate stakeholders should be authorised to use a national brand design, logo or brand identity, in order to prevent its use by unsuitable organizations. Otherwise there is a risk of diluting its impact.

There should be some synergy between the two partners' brands beyond merely achieving extra marketing mileage from their joint marketing resources. Examples abound of **synergy between NTOs and partners**. The most common form of partnership is between destinations and the travel industry, particularly airlines, ferry companies and tour operators, whose message is both complementary and adds considerably to the consumer offer. The NTO inspires an emotional interest in the destination and the partner provides further information on how to access this wonderful experience, thereby driving the consumer closer to a sale. It is important that this addition of commercial information does not destroy either the brand values or inspirational impact of the destination appeal.

The partnership, for instance, between Visit Norway/Innovation Norway and the Hurtigruten coastal cruise company in the advertisement below illustrates a powerful brand synergy, whereby Norway's 'natural' and 'powerful' brand values ("Powered by Nature") come across strongly. At the same time the commercial information is a useful addition for the reader, which does not compromise either the presentation of the brand or its impact.



Increasingly innovative NTOs are partnering with less obvious **non-travel partners**, where there is a natural association. This is usually aimed at extending the brand's penetration into new markets and/or increasing coverage in existing markets.

Working with non-traditional partners can leverage considerable value for a destination through association with a respected non-travel brand. It can also enable the destination to present itself to audiences whom it might otherwise be unable to reach.

Some of the highest profile partnerships that NTOs have formed with non-travel businesses around the world are with companies producing films, music, food, drink and vehicles:

Non-travel brand partnerships

- **Film and music**

- **New Zealand** achieved extensive market penetration through its association with the highly successful *Lord of the Rings* trilogy, as did **Scotland** with *Braveheart* and **Australia** with the 2008 film *Australia*. The jaw-dropping scenery, which was as much of a star as the leading actors in all of these films, underpinned the values associated with their picturesque natural landscape in all these countries.
- **Visit Britain** has similarly achieved considerable additional brand impact through partnerships with film and music businesses, such as Sony and EMI.
- The **United States of America**, which usually relies on individual states to market the country overseas, produced a high impact TV and cinema advertisement in 2005 aimed at the United Kingdom and Japanese markets, using several popular film titles to evoke an emotional association between the country and some of its more famous films. This was an example of powerful synergy between Hollywood and America as a tourism destination: http://www.mcsaatchi.com.au/work_detail.php?workid=157

- **Vehicles**

- The **Namibia Tourism Board's** partnership with Land Rover in Germany projected the rugged values associated with both Namibia as an explorer's destination and Land Rover as an off-road vehicle.

- **Food and drink**

- One of the longest-standing, and one of the most powerful, of such non-travel partnerships has been between **Tourism Ireland Limited** and Guinness. From a tourism perspective

their joint marketing exudes values of Guinness as an Irish cultural asset, which evokes friendliness and the 'craic'¹⁴. It also suggests a human pace of life, which reflects the sense of patience that emanates from Guinness's own advertising, which culminates in the slogan "Good Things Come to Those Who Wait".



The wall plaque reads: "It was here in this very pub that Sofia Rossi on holiday from Milan first discovered Guinness".

- **Visit Scotland** has worked with whisky companies and Highland Spring mineral water. The advertisement below emphasises the destination's and the mineral water's shared values of natural purity.



The issue of **licensing partners** to use a brand design, in terms of a logo or imagery, tends to be more sensitive with regard to place brands than destination brands. This is because place brands cover every economic sector and a wide range of different businesses, whereas a destination brand is largely restricted to travel-related businesses.

Nevertheless, it is usually in the destination's interest to have widespread usage of the logo by as many suitable organizations as possible. The licensing agreement should therefore be as simple as possible.

For an example of Tourism Australia's succinct licensing agreement, see: http://www.tourism.australia.com/content/brand/trademark_form.pdf

¹⁴ 'Craic' is an Irish word which refers to a mix of fun, hospitality and witty conversation, which is a strong brand characteristic of the Irish.

Berlin – Licensing of a brand identity (logo)

On July 1, 2005, The Berlin Business Development Corporation and Berlin Partners Capital City Marketing merged to create Berlin Partner GmbH. The new company was formed to unite the marketing and investor relations activities of the city of Berlin.

The following year, the Berlin Senate commissioned the development of a new brand identity (logo) for the city. The new logo needed to represent the energy and quality of Berlin and would be used mainly for the purpose of economic promotion, especially inward investment.^a The Brandenburg Gate is the key symbol of the Berlin brand; it symbolises “both the divided city and German reunification”.^b

The logo was later adapted for other Berlin-based organizations that represent distinct economic sectors for the city, such as science or tourism.

Berlin Tourismus Marketing GmbH uses the Brandenburg logo on all its publications and campaigns, replacing the word “Tourismus” for Partners in the logo. The logo was adapted for main international markets – “Berlin Tourismus” becomes “Berlin Tourism” in English speaking countries and “Berlin Tourisme” in France and other French language markets.

The logo is a **registered trademark**, for **use by the city’s official institutions and selected partners**. The use of the Berlin logo is highly regulated and **restricted to members or licensees of Berlin Partner**. In return, Berlin Partners feature each supporting company’s logo at events and in their own publications. Members also receive additional benefits such as networking activities, discussion roundtables with representatives of Berlin state politics and industry-specific events and initiatives.



a) <http://www.berlin-partners.de>

b) <http://www.visitberlin.de>

NTOs can also use restrictive licensing of a destination brand to **drive up quality**. They can, for instance, permit only those accommodation establishments or visitor attractions that meet specific quality criteria to use their brand logo.

- In the case of the **New Zealand Way**, one of the world’s most successful and pioneering place brands, a rigorous quality control system was put in place to restrict and license the brand to approved businesses and organizations. This made eminent sense, as a major aim of the New Zealand Way was to improve worldwide perceptions of New Zealand products and services – particularly agricultural and food products, such as butter, lamb and kiwi fruit – and to differentiate them on the basis of their quality.
- **Scotland the Brand**, another early place branding initiative, which emulated many aspects of the New Zealand Way, adopted a less rigorous approach to quality control, although it still had a licensing panel that approved membership applications on quality grounds. Members were permitted to use a brand logo (the word Scotland in tartan font – see below), on packaging, point of sale material and in marketing materials.

One of its most visible applications was on food products (e.g. smoked salmon), where the values inherent in people’s perceptions of ‘Scottishness’ and an association with high quality natural produce, were considered to build competitive advantage.



Based on extensive research into the values of 'Scottishness' in worldwide markets, the idea was that a pack of smoked salmon that was identified as originating from Scotland (e.g. by bearing this logo on its packaging) would sell faster than those from other countries in a supermarket in New York, Paris or Tokyo. This was because of the strength of Scotland's brand values, which incorporated qualities associated with the natural environment, a strong work ethic and reliability, all of which translated into a reputation for quality when linked to natural food products.

2.5.5 User-generated Content and Social Networking: Threat or Opportunity?

User-generated content – Key points

- Far from being a threat to the brand, user-generated content offers a **significant opportunity** to increase brand awareness and marketing impact.
- Even if it means the NTO has little control over content, evidence from commercial travel businesses suggests that most postings are likely to contain images and **messages that enhance the brand's impact** and reputation, rather than damage it. This is primarily because people's motives in posting such content tend to reflect a desire to share positive experiences, rather than disparage a company or a destination.
- The **credibility** associated with a narrative from a real visitor's perspective will generally far outweigh any lack of brand-compliance.
- Similarly, the **odd negative posting** will merely serve to enhance the credibility of the site, as long as positive postings remain in the majority.
- **Total control of messages about a destination is not possible** in the Web 2.0 environment. NTOs that try to exert such control will lose valuable marketing opportunities and may even damage their brand if they are seen to suppress all but good news about their destination.
- Evidence indicates that **postings by customers are overwhelmingly positive** and informative. We can expect to see many more companies and destinations devising innovative ways of using this opportunity for brand extension and free publicity in future.
- **Trust** will become increasingly important as unknown, unqualified and ungraded information sources multiply in the Web 2.0 environment. This provides NTOs with an opportunity to establish a relationship of trust with potential visitors as honest brokers of credible, reliable and relevant information.
- But perhaps more important will be the **way in which NTOs provide signposts and opportunities for potential visitors** to cluster around a point where they are confident they can exchange opinions with others who are likely to be well-informed about the destination. (e.g. through an online virtual information exchange/marketplace site on the NTO website, where potential and previous visitors might cluster because they expect to find and exchange well-informed opinion about a destination.)

- The Web 2.0 environment requires a **radical change in mindset** and a new approach to marketing for destinations. NTOs need to find ways to work with empowered consumers and create ways for them to communicate with each other about the destination. It requires a cultural shift that views potential visitors as fellow marketers of the destination, not merely prospective or past customers.

The Web 2.0 environment, and particularly social networking, personalised communication and user-generated content, has added a revolutionary dimension to destination marketing. People are increasingly **relying on other consumers' opinions**. They are looking for insiders' tips and 'real' people's commentary to complement official 'sanitised' marketing communications.

The Web 2.0 environment has shifted the balance of power from businesses to consumers. It enables interactive peer-to-peer and customer-to-customer communication without relying on business intermediaries or official sources to provide them with information. Some businesses and destination managers see this as threatening their brand because of the lack of control and consumers' ability to say anything about their products and destinations without being accountable.

But does this level of communications anarchy really threaten to damage brand integrity? Is it a threat or an opportunity?

Firstly, comments posted by visitors about tourism products and destinations on blogs and on the most used sites tend to be both **frank and mostly positive**.

Thomson Holidays in the United Kingdom, for instance, have linked with TripAdvisor^a for customers to post and read reviews of their experiences. Their target is to have 100% of their accommodation independently reviewed by customers.^b

easyJetHotels signed a pan-European deal with TripAdvisor to feature independent hotel reviews on the easyJetHotels.com website.^c

Clearly this indicates a faith in the value of such independent reviews as well as a tolerance of the odd negative review, which is likely to enhance credibility without damaging the brand; otherwise it would be surprising for these companies to make such a bold move.

a) www.tripadvisor.com

b) www.thomson.co.uk/editorial/trip-advisor/trip-advisor.html

c) www.easyjethotels.com.

Secondly, it offers an opportunity for visitors to post their **holiday photographs**, and perhaps more significantly, their **holiday videos**, on public sites such as Photobucket.com, Flickr.com and YouTube.com, and for NTOs to link to these sites.

More importantly, being visitors' own footage of their actual holiday experience, it is highly credible. Although production values might not be of cinematographic quality, the 'hand-held' quality is unlikely to damage the brand integrity, because it is 'real'. However, it does significantly increase the available imagery of the destination and communicates the experience in a way that is otherwise hard, and expensive, to do.

But it is not only about visitors' videos. Links can be established to high quality professional footage of subjects, such as wildlife and aerial scenes, that an NTO might find hard to afford. Kenya has linked its website to others containing high quality wildlife film footage and reinforced its brand values in this way.¹⁵

15 www.magicalkenya.com.

Thirdly, it offers a **massive, low cost extension to the NTO's own marketing effort**. On the one hand this means a shift of control, whereby NTOs and product owners no longer dictate everything that appears on their website, but they create a facility for customers to place their own content on the product owner's (or NTO's) website. On the other hand, this offers free, additional, and credible marketing for destinations. An NTO can enlist the support of previous visitors as destination advocates by creating opportunities for consumers to share their experiences – for example through posting comments, pictures or videos of their holiday experiences. This can supplement an NTO's marketing activities at minimal extra cost: there are no media production or space costs. And, in an era where mobile phones have video and internet capability, this is particularly significant for smaller destinations with limited budgets: it offers them an opportunity to show video footage of the destination, which they could not otherwise afford, to visitors to their website.

Fourthly, this poses a significant **challenge for NTOs to remain relevant to potential visitors**. One of the greatest challenges facing consumers, who have access to an almost limitless supply of information from countless unqualified sources, is how to sift this information for quality and reliability. Trust will therefore increasingly become important. People will want to know they can trust the sources they use when seeking information on a destination. Social networking sites and RSS (really simple syndication) feeds will help them select those sources they trust.

But this also implies a potentially important role for NTOs: while they cannot control the content or the sources, NTOs have an opportunity to become one of the most useful and trusted sources of access to destination information, by providing reliable information in innovative formats that potential visitors will find useful, as well as to offer past and potential visitors the opportunity to communicate with each other at a point where most informed opinion about the destination is likely to be available (e.g. by hosting a website, or a section of the NTO website, which functions as an online virtual destination information marketplace and signposting facility).

Creating and structuring access to useful information, from whatever source, in a comprehensible and digestible way is likely to become important for NTOs, at least as a starting point, in helping potential visitors find their way easily through the maze of otherwise largely unstructured information.

Lastly, and most significantly, the Web 2.0 environment involves a whole **new mindset towards communication**: businesses – and destinations – can no longer rely on the old-fashioned style of vertical communication between them and their customers. Customers are communicating with each other and choosing which sources to believe, whether these are official business sources or other consumers. The rise in opportunities for people to place and view user-generated content has changed people's expectations of the way in which product owners – and destinations – communicate with them. It has also changed the way in which product owners – and destinations – need to market to their potential customers. And it has changed people's expectations of their own role in the marketing process, by empowering them to obtain information from other consumers and to publish their own experiences of destinations for others to see.

The opportunity is immense: it will be up to NTOs as to whether they enlist previous visitors as fellow marketers or treat them merely as past customers.

Clearly Web 2.0 has significant implications for marketing destinations in the Web 2.0 era. This is beyond the scope of this Handbook. But the simple message is that NTOs must realise that power lies in the hands of the potential visitor more than ever before. **NTOs need to find ways of building trust and making themselves relevant to empowered consumers** by creating opportunities for them to communicate with each other about the destination in an environment and in a way that adds value for potential visitors.

Wales1000things.com

Visit Wales has been one of the first NTOs to innovatively exploit the opportunity of user-generated content to show exciting footage of activities in Wales taken by visitors.¹⁶ This has significantly extended the coverage of Wales well beyond what their marketing budget could afford.

It has also reinforced the open and direct nature of communication associated with Wales's 'challenger brand' (see chapter 3: *Branding Strategies in Action*).

Visitsweden.com and CommunityOfSweden.com

CommunityOfSweden.com demonstrates the mindset that runs through the Web 2.0 environment. It influences the way Visit Sweden approaches its marketing. The website creates an interactive environment in which people interested in Sweden can 'congregate', discuss and exchange views and find links to other useful sites.

Approximately one third of the content on Sweden's official website, www.visitsweden.com is user-generated content directly imported from VisitSweden's own online community, CommunityOfSweden.com.^a

General world-wide knowledge about Sweden as a destination is limited. Therefore this kind of informal communication plays an important role in showing the variety of experiences that Sweden has to offer. The user-generated stories complete the image of an exotic and modern Sweden, which VisitSweden aims to communicate on the official website, www.visitsweden.com.

On CommunityOfSweden.com foreign visitors and Swedes exchange travel experiences, tips, ideas and images of their favourite Swedish experiences and destinations. The Community is open for all sorts of user-generated content and is credible because the users themselves tell other users about their views on Sweden as a destination. The aim is to attract and inspire people who previously have not considered Sweden as a potential holiday destination.

Sweden is one of the first countries in the world providing a travel community for an entire country. Since the launch of the Community of Sweden in 2007, the forum has gathered 5175 Sweden-enthusiasts and attracted a total of 325,000 visitors from 201 countries so far.

Users' desire for larger, more inspiring images and more interactivity was highlighted in a global user-survey, which was strongly considered when creating the new website. Google's interactive map, which is integrated on the site, enables users to find exciting and thrilling experiences easily all over Sweden. The site also has a direct booking function.

In November 2008, 3 months after the launch of VisitSweden's new interactive site, it won the magazine Internet World's prize for best Swedish website in all categories. The criteria for winning included innovative use of the internet, high editorial quality, pedagogic structure, functional design and a strong development during the last 12 months.

Internet World described the site as:

"Very well-designed. Generous, airy and stylishly coloured. Forum and comments are a matter of course and the activity on the site is high. The 'thumbs up' system where visitors rate the content makes sure that high quality material is emphasized. VisitSweden.com is full of smart solutions that make a visit worthwhile. The site is probably unique in its kind. It is rumoured that National Tourist Organizations and other institutions from all over the world call, wanting to learn from VisitSweden. Highly understandable."

a) www.CommunityOfSweden.com

In conclusion, **the opportunities associated with the apparently anarchic nature of user-generated content far outweigh any likely negatives** and there is little risk of damaging the destination brand. Web 2.0 creates significant new challenges as well as opportunities for NTOs. But above all, it calls for a **new mindset** towards doing business and communicating with potential visitors.

See also ETC/UNWTO Handbook on E-Marketing for Tourism Destinations (2008) and chapter 3 *Social Networking and User-Generated Content*.

2.5.6 Brand Coherence: Image without Cliché

One of the criticisms of many NTOs is that they use **national stereotypes** to promote their destinations. This can be insulting and demeaning to citizens and appear out-of-date to visitors. And, if citizens are not comfortable with the way in which their country is being promoted, then the NTO's work will be harder and the destination's brand impact will be less. This is also likely to mean that stakeholder organizations will not buy into the country's brand values and they will be unwilling to reflect them in their own marketing communications. An opportunity for synergy will therefore be lost.

But the whole point of a brand is to identify the **country's essence** and reflect this in all marketing communications. People need simple, strong symbols in order to recognise the country. So, can destination branding avoid using national stereotypes?

There is a clear **difference between stereotypes and icons**. Icons are respected symbols that represent a country. Stereotypes are caricatures that misrepresent the country in a way that is considered false or demeaning. The difference lies largely in creative execution: in the tone of voice used to describe the country and the style and content of the visual imagery.

Stereotypes often revolve around the way in which people are represented. At best this can be inaccurate and simplistic; at worst it can be patronising and insulting. For instance, describing people that a visitor might meet in the following terms is embarrassingly clichéd: 'friendly local fishermen serenade visitors with traditional ballads on their way home from the sea'. Far better, if the main points are that people are friendly and the country still supports a traditional fishing industry which provides fish for visitors, to concentrate on the visitor benefit and talk in less patronising language – e.g. 'Fresh fish every day' – and to link this to an illustration of boats and/or fishermen that shows the traditional fishing industry still thrives. Consumers do not want to be patronised with faux-romantic descriptions of indigenous people and traditions or staged pictures that do not reflect contemporary reality. Today's consumers are highly marketing literate and can smell when they are being talked down to. In terms of imagery, pictures of people going about their regular business in a natural setting are far more convincing than staged cultural shows or posed pictures of indigenous people in national costume.

NTOs often experience **'icon-fatigue'**, where they have become so used to seeing an iconic historic building (e.g. the Eiffel Tower in Paris, the pyramids in Egypt, the Coliseum in Rome) in their own marketing materials that they decide to drop it in favour of a less well-known image. This may be appropriate, particularly in more established markets, where continued use of a major icon suggests a lack of imagination by the NTO and a fresher marketing image is required to retain people's interest in the destination. However, it is worth remembering that the iconic historic building became iconic for the very reason that it is an outstanding example of its type and a strong symbol of the destination. Its use may still be warranted in newer markets, where the destination is less well-known and may need to use an iconic image to attract attention. Historic buildings, although they may eventually become over-used in established markets, seldom become clichés in the way that the inappropriate representation of people can.

2.5.7 Branding on a Budget

Branding for all – Key points

- **Branding is for everyone.** It is too important not to be.
- A destination can brand itself **regardless of budget size.**
- The brand should **run through all marketing communications** – it should be felt and smelt by the audience.
- Big budgets only buy greater audience penetration. They do not buy better **brand values.**
- A destination without a **clear brand identity** is practically invisible.

No budget is too small for a destination brand. In fact no destination can afford to market itself without defining its brand. Countries with small budgets should take heart. Everyone can, and should, have a brand. It is important for all destinations, no matter how small, to dispel the myth that a brand is a luxury that only larger countries can afford. The idea that small countries cannot afford a brand is akin to suggesting that only rich people can afford a personality.

Of course it is true that TV is the channel that people often tend to think of when talking about traditional 'brand advertising'. And that is expensive. However, with the increasingly personalised marketing that the internet now allows quite cost-effectively, and the plethora of TV channels, the power of TV relative to other marketing channels will reduce, while online and narrowcast communications will increase. **The opportunity for all destinations, big and small, to communicate with potential visitors has therefore never been greater or cheaper.**

Not everything that a destination does to project its brand needs to be expensive. In fact branding is about **"finding the truth, finding an idea that embraces that truth and putting it through everything they do"**.¹⁷ The critical point is "running it through everything they [destinations] do". Once the brand essence and values have been identified, then they should underpin and run through every single act of marketing communication, whether that is a simple press release, a website or a multi-million dollar advertising campaign. The brand's personality should ooze from every pore of every marketing communication with potential visitors.

So, small countries that can only afford to produce a few website pages can, and should, run their brand through their website in the same way that a large well-funded destination runs its brand through its TV advertising campaigns. **Branding is for everyone.** It is not the preserve of the big budget destinations.

Of course establishing the brand essence and values in the first place will cost a certain amount; and that is best done with the help of a **professional agency**. But it is far better to spend a limited amount on establishing the brand in the first place, so that it can be confidently run through all future marketing communications, than to waste money on unfocused advertising that neither differentiates the destination from its competitors nor presents it in a consistently recognisable way.

It is also important to remember that, without a clearly defined brand, there is little chance that other destination stakeholders, such as tour operators, will consistently apply the destination's brand values in their own marketing. Consequently there will be little opportunity to achieve **synergy between an NTO's marketing messages and those of the destination's stakeholders.**

17 Wally Olins, interview in *Monocle Magazine*, September 2007, p. 60-61.

2.5.8 Brand Lifespan

Refreshing the destination brand – Key questions

- Have consumer **tastes changed**?
- Are consumer perceptions of the destination **out-of-step** with current reality?
- Have current brand values **lost their resonance** with today's visitors?
- What are the **reasons for change**?
- What **benefits** will change bring?
- How much will it **cost**?
- How important is the **existing brand equity** amongst key market segments?
- How can existing brand equity be **retained** when the brand is refreshed?
- What, if any, **elements of the existing brand values should be retained** when developing a new brand?
- Does the brand need **refreshed** or is a **complete rebranding** necessary?
- Or is it merely the **marketing execution** that needs a fresh approach?

How long can a brand last? When should it be changed?

Firstly, it is important to decide whether a complete rebrand is necessary and why, or whether the brand needs merely to be refreshed.

It is important to remember that the value of a brand comes from the **recognition that it builds up in consumers' minds over time**. So, changing a brand is a radical, but nevertheless sometimes necessary, move. The ideal situation is for brands to live for as long as possible. Radical change risks losing the brand equity that has been built up at considerable cost over many years. And rebranding is an expensive process.

Rebranding is therefore not something that should change as frequently as marketing campaign themes. When it is deemed necessary, a thorough cost-benefit analysis should be undertaken that assesses the likely loss of existing brand equity as a result of discarding the old brand against the benefits expected from a new brand. This process should identify which, if any, elements of the old brand are worth retaining and what status these might have within a new brand.

On the other hand, **refreshing the brand**, rather than radically changing it, is a much more frequent – and usually much wiser – move. The trick is to ensure a link to the past, in order to carry years of accumulated brand equity and reputation into the future, while signalling a new approach to the future.

Destinations cannot change their core brand in the way that product manufacturers can. Nevertheless a destination brand should always be **dynamic and open to modification**, to reflect changing nuances in consumer perceptions and tastes. But, unless a new potential visitor segment emerges to challenge the brand's core promise, this is usually a gradual process. And a living brand should be sufficiently dynamic and flexible to absorb such adjustments smoothly. So, when the time comes, most destinations will refresh their brand, rather than radically re-brand in the way that manufacturing businesses do.

In the commercial world, **reasons for rebranding** consumer products generally fall into the following areas:

- The product has failed;
- the product has grown tired;
- the product's reputation has been severely damaged;
- the world has changed but the product has not;
- consumer tastes have changed dramatically;
- the company has been taken over or merged with another;
- the company has lost its way;
- new managing director or chairman.

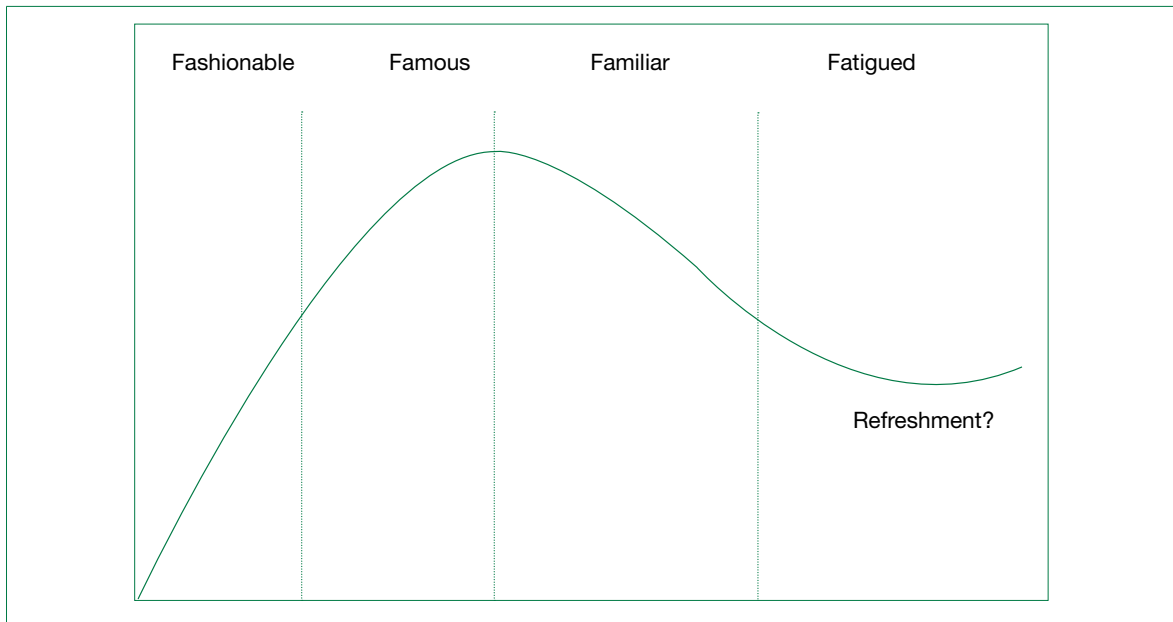
NTOs should use this test (with the exception of the last point about a new managing director or chairman) when considering whether it is time to refresh their brand. Otherwise they risk wasting money and long-established brand equity for possibly little gain.

Sometimes it is the way in which a destination's brand values are conveyed in **marketing campaigns that needs to be refreshed**, rather than the brand itself. If they do not come across sufficiently strongly or the creative execution is poor, the marketing (and perhaps the marketing agency) needs to be changed. Before embarking on a rebranding or a brand refreshment exercise, NTOs should ask themselves whether it is the marketing execution or the brand itself that is failing to create sufficient impact. Otherwise a very expensive mistake can be made.

The **life cycle** of a destination brand depends on the extent to which it remains relevant to potential visitors. When its relevance wanes and it begins to lose its ability to excite consumers it is time to ask why. The answer may reveal a need to refresh the brand. There are no simple rules about the length of time that a destination brand should endure. It is up to the NTO destination brand manager to continually monitor the brand's esteem and impact (see chapter 5 *Measuring Brand Impact*). The brand manager should aim to squeeze the maximum value out of the current brand as long as it remains powerful. But he/she needs to be aware when its impact has peaked. The brand manager needs to begin the process of refreshing the brand just before it starts to decline. The **brand fashion curve**¹⁸ below illustrates the destination brand life cycle. The destination brand manager needs to identify when the brand begins to slip from being 'famous' towards 'fatigued'. When the brand starts to feel comfortably familiar it is time to consider refreshing the destination brand.

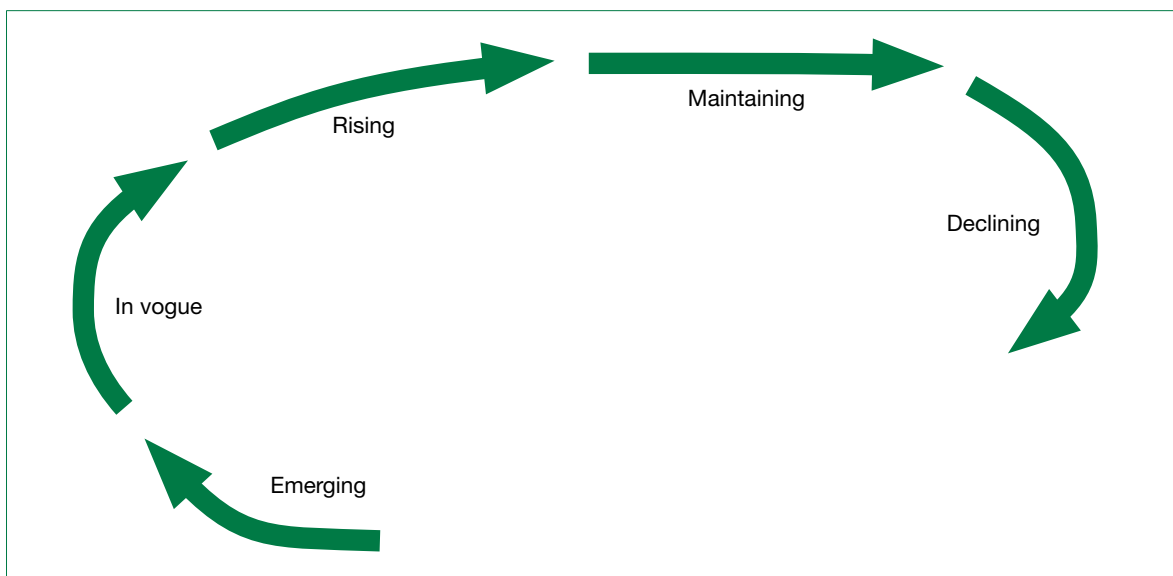
18 Morgan, N. and Pritchard, A. (2004), *Destination Branding: Meeting the Destination Branding Challenge*, Elsevier.

Figure 2.10 The destination brand fashion curve¹⁹



The Future Brand Country Brand Index²⁰ identifies countries (as opposed to just tourism destinations) that are **'emerging', 'in vogue', 'rising', 'maintaining' and 'declining'** (see also 5.5 *International Benchmarking Surveys*). It argues that a country begins to 'emerge' when it clarifies its unique essence and begins to resonate with audiences. It then goes through the stages of being 'in vogue' as the new place to be amongst 'early adopters'. This is followed by a growth in people's awareness of the country, accompanied by a 'solidifying brand image' – the 'rising' stage. Once it has become established it enters the 'maintaining' phase, where it might remain for some time, according to the quality and consistency of the brand experience it offers. Decline can set in just because the brand becomes tired and ceases to resonate with a new generation of potential visitors; or events, such as war, natural disasters, terrorism, contaminated export products, a failing economy, unpopular foreign policy, etc. can tip a country's image into decline.

Figure 2.11 Countries in momentum²¹



19 Ibid.
 20 www.futurebrand.com
 21 www.futurebrand.com

The time to consider refreshing the brand is while it is still in the ‘maintaining’ stage, which corresponds to Morgan and Pritchard’s ‘familiar’ stage. Otherwise it might be too late.

Unlike consumer products, the **inherent core of a destination changes little over time**. Changing consumer tastes and the emergence of new markets are the most usual reasons for changing a destination brand. The brand, and its core values, should be kept under constant review to ensure it is relevant and expressed in the most relevant and impactful way. Changing a destination’s brand values is a big step. Refreshing a destination brand is usually more productive than radically changing it, unless there are compelling business reasons for radical change. One such exception was Spain in the 1980s and 1990s, which undertook a radical rebranding of the country.

Spain: The rebranding of a destination

Spain had been a major beneficiary of the growth in international travel in the 1970s and 1980s. But Spain’s enthusiastic response to northern Europeans’ appetite for sun, sand and sea had led to overdevelopment along Spain’s coastline, representing one of the world’s most glaring examples of mass tourism. Spain’s costas catered for northern European, and particularly British, tastes, which were far from cosmopolitan. A home-from-home was created for British tourists, whereby British pubs, British menus and British holiday representatives provided a familiar environment that stripped the costas of their Spanish sense of place.

By the early 1980s Spain had a largely negative image in northern Europe as a cheap, booze-fuelled beach destination that was unappealing to higher spending travellers who were more interested in indigenous nature and culture and experiencing somewhere different when they travelled. For them Spain was not even a consideration. But just a few miles inland the real Spain remained largely unvisited.

Spain took a brave decision in the early 1980s to take a radical turn and focus its international marketing on culture and the interior. It promoted a contemporary artistic Spain alongside its cultural heritage, focussing on icons such as the Prado in Madrid and celebrating contemporary creative Spanish artists such as the film director Pedro Almodovar. It bid for and won major world events, including the 1992 Barcelona Olympics and Seville Expo. The industrial city of Bilbao was given a makeover with the building of the Guggenheim Museum in 1997. It promoted the rich variety of its cities such as Valencia and Seville along with quality accommodation in former castles, manor houses and monasteries (*paradores*). City regeneration, a focus on culture and the arts, winning bids for large events, a recognition of the interior and a focus on more discerning and higher-spending market segments all contributed to a new brand positioning for Spain throughout the 1980s and 1990s. To reflect this, a new vibrant, innovative and distinctive logo – España – el sol de Miró – was created, by famous Spanish modern artist Joan Miró, using a combination of the colours of the Spanish flag.



Suddenly a new image of Spain was launched to the world – cultural, ‘cool’ and contemporary.

Later, different regions of Spain, such as ‘green Spain’ in the north, and beach destinations, such as Menorca and the Canary Islands were introduced under the new brand. While the creative style of its advertising campaigns changed over the years, its brand values, which had been established during this transformation period, remained consistent. Then, as its different regions became better known, Spain gradually took more of a back seat, often leading with its different regions (see examples of Andalusia and Galicia below), but always retaining a clear sense of Spanish identity through prominently featuring the highly distinctive and widely recognised *España – el sol de Miró* logo and, more recently, the “Smile” device (see advertisements below). Spain had performed a remarkable rebranding, which had not only retained its traditional beach market, but also introduced a different Spain in all its regional glory to new markets, who would previously not have even considered Spain for a holiday.



See also chapter 6 *Branding Strategies in Action*.

Bringing the Brand to Life

3.1 Introduction

Bringing the brand to life – Key points

Bringing the brand to life, or applying it in a meaningful way, is often the most challenging aspect of branding. This needs to be addressed in two critical, but quite different, arenas:

- Applying the brand in **marketing communications**.
- Living the brand in terms of **stakeholders and residents' behaviour**.

Olins¹ talks about having to be able to “sense the brand”. He refers to “four vectors of brand tangibility”, in which the brand manifests itself:

- **Product:** What an organization makes or sells.
- **Environment:** The physical environment of the brand – how it lays out its stall.
- **Communication:** How it tells people, every audience, about itself and what it is doing.
- **Behaviour:** How its people behave to each other and to the world outside.²

This chapter addresses the last two “vectors of tangibility” – communication and behaviour.

Branding agencies can develop the theoretical underpinnings for the brand (the brand personality, essence, values, etc.). But unless these are clearly understood by the destination brand manager, clearly explained to brand partners and creatively interpreted in marketing communications, they will not convey the true excitement and appeal of the destination to potential visitors. Again, this is a relatively simple process. But it relies on highly committed **brand managers and creative marketers and designers**. This is about ensuring the brand values are conveyed in all marketing communications.

At its simplest **the brand personality should ‘ooze’ out of every contact that the destination has with potential visitors**, whether in marketing communications or in the way in which visitors experience the product and are treated by residents. Although the latter is more difficult to control, the visitor should have these brand values reinforced throughout his/her experience in the destination. Every contact that he/she has with the destination and its people throughout his/her stay, from arrival at the airport through the quality of accommodation to the welcome he/she receives from ordinary people, will determine his/her perception of the destination. These ‘customer contact points’ or ‘moments of truth’ provide the destination with an opportunity to strengthen its relationship with the visitor or to destroy it.

1 Olins W. (2008), *The Brand Handbook*, Thames and Hudson, London.

2 Ibid.

3.2 Applying the Brand Values – Marketing Communications

3.2.1 Marketing Communications

The need for the brand to run through every marketing communication and for the brand personality to pervade every marketing activity has been stressed above. **The brand is the fundamental building block upon which all marketing activity is constructed.** Knowing how to apply the brand in marketing communications is therefore essential. Both the NTO and stakeholders need to understand what this means and how to do it. This is the role of the brand toolkit and the brand manager.

3.2.2 Toolkit/Brand Guidelines

The first essential step, having developed the brand, is to produce a set of **brand guidelines** (brand book or brand toolkit). Its purpose is to explain clearly to NTO staff, tourism operators and other stakeholders, how to use the brand in their marketing communications. It needs to be simple, clearly written and easy to understand. It should also be inspiring and practical.

Quite simply, its role is to help everyone to look as if they come from the same country. It does this by explaining what the country's brand essence and values are and how to express them through tone of voice, type of imagery, design and specific colours.

The toolkit should cover two main subjects:

- **Brand personality guidelines** specifying how to apply the destination's core brand values in marketing communications in a way that reflects the destination's brand essence, so that there is a consistency in the presentation of the destination. Over time, this will help raise the profile of the destination.
- **Technical design guidelines** specifying how to use the logo, font, visual imagery, colour palette, etc. in marketing materials. These should also specify how to apply the country brand identity (if the NTO has one that it permits stakeholders to use).

The following is a suggested structure and contents for a brand toolkit:

Brand personality guidelines

- **Definition:** What is a brand?
- **Introduction:** Explain the value and purpose of a destination brand.
- **Location:** Explain where the destination brand will be used (e.g. In NTO marketing communications, in tourism operators' own marketing materials, in diplomatic missions overseas, etc.).
- **Explanation:** Explain the key elements of the destination brand and what their purpose is. Build this explanation up using the elements of one of the brand-building models (e.g. brand pyramid: rational attributes, emotional benefits, brand personality, unique positioning statement, brand values and essence) and explaining how they relate to each other. This will help stakeholders to understand the essence of the destination brand and why a particular set of brand values has been chosen.
- **Application:** Explain how to apply the destination brand values in marketing communications, so that the destination always looks like itself and can differentiate itself from other places (e.g. through tone of voice, visual imagery).

N.B. It should be noted that such cropped images are used mostly in brochures and websites, where they are complemented by other scenic pictures. They would seldom work on a stand-alone basis in an advertisement, unless they were backed by a large amount of other advertising. Their association with larger, more informative imagery is necessary both to complete the story for the customer and to enable these cut-off images to come to life in a dramatic way. They would not work as single images, as there would be no sense of place to anchor these secondary images. But, as supporting images, they add a sense of drama, dynamism and a fresh, confident approach to the presentation of the destination, which reflects Wales' 'challenger' brand values.

Visit Wales: Visual imagery



Technical design guidelines

- **Font style/typeface:** Decide on a particular font for titles/headings and use it consistently across all printed and electronic platforms (e.g. brochures, advertisements, posters, websites, etc.) However, the body text should always be clean and not elaborate or stylised so that people can read it clearly.
- **Colour palette:** Identify colours and textures that best reflect your destination brand. Include technical specifications for colours to be used in marketing materials (e.g. brochure page background, website pages, etc.).
- **Photography and visual imagery:** Define any technical requirements (e.g. image resolution). Include an online photo library contact for people to obtain NTO-sanctioned brand-compliant pictures ('signature images'), if you have one.
- **Logo:** Technical design specifications are required that include: colour specifications, size/dimensions, position, appropriate and inappropriate background (e.g. on light, not dark, background), use in large and small sizes, electronic and printed usage, use in different media (e.g. print advertisements, brochures, posters, web pages, merchandise, letterheads, slide presentations, etc.), use in black and white and colour.
- **Permission:** Explain who or what categories of organization are allowed to use the logo, and on what terms.
- **Process, Sources and Costs:** Explain how to access the logo: Where from? Who from? Include a contact telephone number/website/address (e.g. downloadable from NTO website; by emailing a named person in the NTO, etc.). Any costs associate with using the logo (e.g. annual licence fee, etc.) should be specified.
- **Contact/further information:** A telephone number, email, web address or postal address should be given for anyone wishing to enquire further about how to apply the destination's brand values or use the logo.

Toolkit publication format

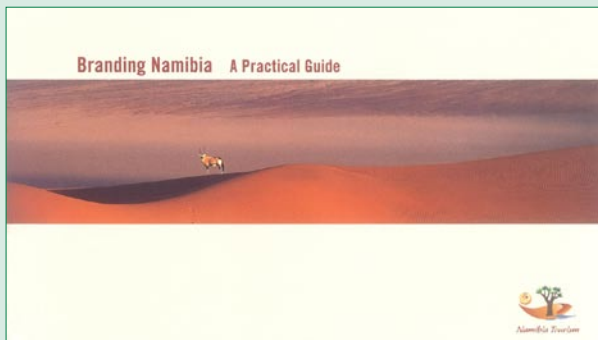
Ideally the toolkit should be published electronically and be downloadable from the NTO website. The toolkit itself should in itself exemplify the brand it is trying to explain. It should therefore 'ooze' the brand values from its own design.

The medium is the message

One of Namibia's brand insights was that wide-angle photography was one of the best ways to capture the country's vast, majestic landscapes, which expressed the brand values of **soulful** and **liberating**.

Therefore the images used in marketing communications should, as far as possible, have a landscape, rather than portrait, orientation.

Consequently, the Namibia brand toolkit was produced in landscape format, steeped in Namibian brown, beige and orange sand colours.



Examples of destination branding toolkits (national, sub-national and city):

- Tourism Australia: www.tourism.australia.com/Marketing.asp?lang=EN&sub=0413&al=2119
- South Africa: http://www.brandsouthafrica.com/index.php?option=com_content&task=view&id=348&Itemid=69
- Banff Lake Louise, Canada: www.banfflakelouise.com/brand/building-the-brand
- Glasgow, Scotland: <http://www.seeglasgow.com/glasgow-the-brand>

3.2.3 The Logo – Brand Essence or Symbol?

The role of a logo

- A logo is a **symbol of the destination**, whose impact derives from consistent use and recognition over time.
- A logo can **seldom represent the summation of a destination** in all its complexity. If it tries it is likely to be cluttered, unrecognisable and unmemorable.

- A logo should be:
 - **Attractive;**
 - **clear**, with clean lines, for impact and distinctiveness;
 - **simple**, with no more than three visual elements;
 - capable of rendition in **colour and black and white;**
 - legible in both **small and large** sizes;
 - **suitable for all media** on which the NTO wishes to use it (e.g. electronic, print, outdoor);
 - **consistently applied** in all marketing communications.

A logo is a **symbol** that, through consistent usage over time, achieves recognition for the destination. It is a symbol, or visual shorthand, that represents the destination (cf. the Nike tick). It is unlikely to be capable of succinctly summarising all of a destination's brand values without being cluttered and cumbersome. However, if it is attractive, instantly recognisable as emanating from that destination, and can achieve impact in the way that Spain's *el sol de Miró* logo has done, it will be very powerful. But it is not in itself a brand. And, as few destinations can replicate the impact of Spain's *el sol de Miró* logo, a logo's power generally comes from its consistent application over time, which enables recognition, much more than from its component parts.

Unfortunately, logos can too often be decipherable only to their designers. **Expecting a logo to represent the essence of a country in one small image and still remain impactful is an unreasonably tall order.** Too many countries try to cram too much information into a logo, in the form of different images. The result is lack of clarity and confusion, leading to a logo that is not distinctive. It is therefore unrecognisable, unmemorable and fails to act as a visual trigger for people to recognise what it represents.

As with a destination brand, **NTOs change logos at their peril.** They should seriously consider the potential loss of recognition value vested in a logo that has been built up over the years amongst international tour operators, visitors and potential visitors, before discarding it in favour of a new logo. This is not to say that changing a logo is pointless. Fashions change and no destination wants to appear out of date. This is merely an argument for an honest appraisal of the reasons for change and a clear understanding of the pros and cons of doing so, with a clear understanding of the true role of a logo. This understanding of what a logo can and can not do will guide an NTO's thinking and ensure the best result when a change of logo is deemed necessary.

Consistency = impact

- The **Shell** (vehicle oil, petrol) logo is an example of incredible continuity. It has evolved through approximately ten iterations since the early 1900s. Today's Shell logo would still be recognisable by a motorist from 1905. In fact the logo has progressed from being merely a scallop shell with no words in the early 1900s through a scallop shell with the word "Shell" on it and back to a more contemporary design of a mere scallop shell without words again today. The main differences have been in the addition of colour and a rounding of its edges.
- **Spain's *el sol de Miró*** logo, created in 1982, has been in use for over 25 years:



Avoid trying to represent all facets of your destination (e.g. wildlife, mountains, sea, people) in the logo. **A logo is not about being inclusive** and covering every aspect of the destination so that nobody feels left out. This will guarantee that it is instantly forgettable.

A logo must be **immediately impactful**. As a general rule, if a designer has to explain what the different components and colours of the logo represent, then it is not doing its job. It is not sufficiently striking.

It is important to understand that a logo's value lies in its ability to function as **a symbol that people come to recognise over time** as representing something (e.g. a product, a company or a country).

With this in mind, the **essential qualities of a logo** should therefore be:

- **Simple/clean** equals distinctive, impactful and memorable. Ideally no more than three visual components should be included at an absolute maximum. Less is more: one component will be most impactful; two components can still have impact if designed sensitively; logos with three components require even more sensitive design.
- **Attractive:** This can be quite subjective. It can not be measured through quantitative research. But it is wise to test the reactions of a small group of key stakeholders (e.g. brand steering group) to several design options for the logo.
- **Consistently applied:** Its continued use over time is what generates recognition. This is where a logo's power principally comes from, as recognition ensures impact.

It is important not to judge a logo in isolation. Logos are always linked to photography or text about the destination – in advertisements, websites, brochures, etc. It is therefore not appropriate to assess a logo's impact without reference to the context of the marketing communication within which it sits. Nevertheless, given its role as a symbol, whose usage over time should inspire recognition of the destination, the more visually striking it is the more chance it will have of achieving this. And the simpler and cleaner it is the more chance it will have also.

When designing a logo, it is important that the **brief to designers** reminds them that the logo will never stand alone. Designers should be discouraged from thinking that they have to incorporate a country's entire brand essence in one distinctive and striking logo. This is almost impossible. Few logos can genuinely convey the entirety of a destination's brand essence in their visual imagery. Nevertheless designers should strive to capture some elements of the essence of the country for the logo to be sufficiently representative. But they should be briefed to achieve visual impact above all else.

It is important to differentiate between **corporate and destination logos**. Some destinations have both. Their roles are as follows.

- **Corporate logo:** This is a logo that can usually only be used by the NTO. It is the marque of the organization. It acts as a stamp of approval to reassure people that a document, letter or advertisement etc. comes from the NTO. It implies a certain standard, it is official, and it is authorised by the NTO. It is sometimes used on advertisements that are undertaken in partnership with travel or other stakeholders, again to indicate official endorsement by the NTO.
- **Destination logo,** sometimes known as a country brand identity: This is a logo that is used as a symbol of the country. It is used to build up recognition over time (cf. the *España* logo). It mostly appears on marketing communications – certainly on those produced by the NTO, often on joint marketing communications between the NTO and stakeholders (e.g. travel and non-travel partners), and sometimes on stakeholders' own solo marketing communications. In the latter case, where stakeholders use it in their own marketing communications, it is usually restricted by licence to organizations and businesses approved by the NTO.

The more widespread its usage by many stakeholders, the greater impact and recognition a destination logo will generate for the destination. But it is important that these stakeholders reflect the destination's brand values and, ideally, project them in their own marketing communications. Otherwise the value of the destination logo will be diluted and there is a risk that the destination brand image might suffer. Hence the need to control the usage of the destination logo through a licensing system.

The difference between corporate and destination logos:



Corporate logo (Tourism Australia)



Destination logo (Australia)



Corporate logo (Maison de la France – French NTO)



Destination logo (France)

3.2.4 Slogans and Straplines

Slogans – Key points

- **Slogans are seldom ‘forever’**, because few can truly and succinctly summarise a destination’s personality.
- If you are unable to come up with a succinct slogan that clearly projects the destination’s brand positioning (which is quite likely), it is better to use a **descriptive slogan**, rather than meaningless ‘me too’ marketing slogan that fails to convey any information about the destination.
- **Slogans are optional, not essential.** Is a slogan really necessary? If it doesn’t add anything to the logo, then its value should be questioned.
- **Different slogans can be used for different campaigns to different segments and in different countries**, without destroying any brand values
- Remember: **The logo (and the brand essence), not the slogan, is the important constant**, which aids recognition.

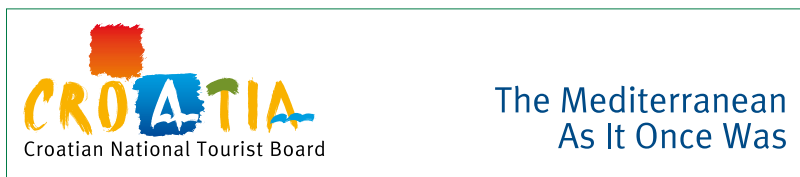
The addition of a slogan or strapline that succinctly summarises the brand position is the ultimate aim of logo design. But, like a definitive logo, this is a highly elusive goal. Most destinations try very hard to find a suitable, long-lasting slogan. However, it is very **difficult to come up with a slogan for a destination that clearly epitomises a destination’s brand position, in a way that is striking and capable of enduring for many years.** Few destinations manage to come up with a slogan that is impactful, memorable, and summarises the essence of the destination, or is capable of equally effective rendition in different languages. Those that do tend to be notable exceptions, such as Costa Rica, New Zealand and Croatia, whose slogans manage powerfully to reflect their brand essence:



Several years ago Ireland used a strapline for the incentive market, “**Ireland – The Ancient Birthplace of Great Times**”.

This was a good example of a country that had simultaneously managed to incorporate two strong brand values (cultural heritage and the ‘craic’, which refers to a mix of fun, hospitality and witty conversation) within a pithy strapline, which was both humorous and striking for its apparent contradiction between the past and the contemporary. But this is an unusually difficult feat to pull off.

Croatia conveys a clear sense of its market position and its target market’s motivation. It has also managed to reflect its brand values in an emotive way that conveys a sense of history, tranquillity and respect for tradition and nature in the slogan “The Mediterranean As It Once Was”:



Slogans such as those above are highly effective if they can convey the destination’s essence in such a way that it could be nowhere else. But this is the holy grail of branding. Very few do, or ever could. Some manage to **define the country such that it could be nowhere else, even if the entire nation’s emotional essence is not comprehensively conveyed** (e.g. “Peru – Land of the Incas”). Unfortunately too many destination managers waste time searching for the perfect slogan to define their destination.

Unless they can truly summarise a destination’s character, **slogans risk being meaningless marketing clichés** (e.g. “The World’s Best Kept Secret”). Many are also shared by other countries (e.g. “Land of Contrasts”). These are not necessarily lacking in relevance; but they are not unique descriptors of the destination. Consequently, slogans, where they can genuinely add something, might best be **tailored to individual market segments** (e.g. the same destination might use different slogans for different market segments: “Country X – the World’s Adventure Playground” for the adventure market and, for an older, more cultural market segment “Country X – Cultural Crossroads of the Region”).

If an NTO has not achieved the holy grail of truly defining a destination’s essence in a succinct slogan, **a range of slogans can be used to summarise the brand’s position in different marketing campaigns targeting different market segments**. They can also be changed from year to year according to that year’s marketing campaign (e.g. “Year of Sport”, “Year of Culture”, etc.).

The point is that the brand essence should be conveyed visually through the text and tone of marketing communications, as well as in residents’ behaviour. With some very notable exceptions, it is unlikely to be capable of being expressed in a mere slogan.

However, **slogans are not essential**, particularly if the logo is visually strong. If a ‘killer’ slogan proves elusive, or if the outcome is too cumbersome and fails to differentiate the country sufficiently, it is worth considering what a slogan actually adds. Is it really necessary? In such cases, a **descriptive slogan**, which says something informative about the destination and thereby helps define the destination (e.g. “Peru – Land of the Incas”; “Innsbruck – Capital of the Alps”) can be more impactful than an **emotional slogan** that fails to differentiate the destination from its competitors (e.g. “Asia’s Best Kept Secret”; “Land of Contrasts”). Such indistinct marketing slogans, which contain no definitive destination values, seldom add to an understanding of the destination amongst today’s sophisticated and relatively ‘marketing-proof’ travelling audience.



When trying to decide **whether or not a slogan adds value to a logo** – and therefore whether or not to include one – a simple test is to ask yourself ‘What would this slogan add to an alien’s knowledge of my country?’ If the answer is ‘nothing’, because it is no more than an empty marketing phrase, then it is probably not worth including a slogan. An exception to this might be where the slogan was being used extensively in high profile marketing campaigns that would deliver massive visibility. But even then, it is unlikely to add very much.

Some of the most powerful logos just use the destination name with a visual image and **no slogan**:



3.2.5 The Creative Brief

Writing a creative brief that ends up producing a strong advertising idea is not difficult. But it does require clarity of thought and a compelling proposition that embodies the essence of the brand.

With the brand wheel, brand pyramid (or whatever model you decide to use) in place, the proposition has already been created, in terms of the destination’s competitive identity – and the rest of the brief is largely made up of factual information. This must be relayed to the creative people who will come up with the advertising idea and in turn, the consumers who will respond to that advertising.

A creative brief is like a road map. It sets a clear direction and a destination. A great brief lays out the direction for the creative team to follow. It should lead to imaginative, thought-provoking and persuasive advertising.

A bad brief sets a creative person off in the wrong direction, so they have to stop and start again, continually questioning where they are going. This can take ages to resolve – if indeed the creative person manages to find a solution at all.

The process for writing a creative brief is very simple. All it requires is following a series of 10 easy steps:

Steps to writing a creative brief

- **Background**
 - What is the current state of the destination you want to advertise?
 - Is tourism healthy, static or declining?
 - Is it well known or unknown?
 - Is it known for what you want it to be known for?
 - What advertising has been done before?
 - Have any recent circumstances created this opportunity?
 - What are your competitors doing better than you?
 - What are you doing better than them?
 - What research findings are there?
- **Objective**
 - Why, specifically, do you want to advertise?
 - What are your objectives?
 - How will they be measured?
- **Proposition**
 - What is the one single thing that you wish to communicate?
- **Justification and Support**
 - Why is this proposition the ‘truth of the brand’?
 - What other elements are there to back up this positioning?
 - What other support points are worth weaving into the overall communication message?
- **Target Audience**
 - Who do you want to talk to?
 - Who are your primary and secondary audiences?
 - Are there other stakeholders whose needs you should consider?
- **Tone of Voice**
 - How do you want your message to sound?

- **People's Response**
 - What do you want people to do once they have seen your advertising?
 - Is it direct response?
 - Is it a long-term message?
 - Is it about changing perceptions?
- **Advertising Requirements**
 - What media would you like to consider?
 - Does this choice form part of an overall strategy?
 - What time line are you following?
- **Budget**
 - What is the total budget you have allocated for this task?
 - How does it breakdown between media, production and creative fees?
- **Mandatories**
 - What information must be included within the advertising? (E.g. logo, website, contact details, etc..)

The success of any brand communication lies in ensuring that all communication is 'on message'. If a piece of advertising or direct mail or a website does not tie back to the core essence of the brand and tie up with the overall proposition it will only serve to weaken that brand by confusing the consumer. All communications therefore have to link together and share the same brand values to be effective.

Great advertising is only ever as good as the information supplied within the brief. Following these simple steps will ensure that the creative people who are commissioned to develop the advertising should be well-equipped to create an imaginative piece of communication that inspires your target audience.

3.3 Living the Brand Values – Behaviour

"Behaviour is almost always the most significant element in service brands."

Wally Olins³

Living the brand – Key points

- The **visitor's experience** must live up to the brand's marketing promise.
- **Every contact with the destination** counts for the visitor.
- Critical '**customer touchpoints**' or '**moments of truth**' can be identified by plotting the '**customer journey**' from the visitor's arrival to departure for each main market segment.

3 Olins W. (2008), *The Brand Handbook*, Thames and Hudson, London, p. 42.

- The **onus lies with the NTO** to develop relationships with key officials in relevant government departments, tourism businesses and other organizations in order to make sure that tourism's voice is heard when key decisions that might affect the tourism infrastructure are being made.
- The NTO should develop relationships with **tourism service providers** in order to anticipate and, if necessary, intervene where there is a risk of failing to deliver the brand promise.
- It is important that **key decision makers** at least make their decisions with the full knowledge of any impact they might have on the destination's tourism reputation.
- **The NTO must also live the brand**, by reflecting the brand values in its own internal culture – in the way that it behaves and communicates (see Wales 'Challenger Brand' in chapter 6 *Branding Strategies in Action*).

Applying the brand values in marketing communications is important. But it is even more important that visitors experience the brand when they arrive in the destination. Nothing destroys a brand image as quickly as a bad experience. **The destination must live up to its marketing promise.** On the one hand, this is not always easy because people are not automatons and will generally not respond to being exhorted to display 'brand-compliant behaviour'. On the other hand, the brand should be a distillation of what already exists; it should never be a promise of something that might exist in the future or something that is just wished for. The challenge therefore, is for the destination to identify those areas in which the customer experience of the brand is likely to be least satisfactory and attempt to remedy them.

Any **disconnect between the brand promise, as projected in the destination's marketing, and the visitor's experience in the destination** will erode confidence in the destination brand. For instance, a destination that promotes itself as 'green' and environmentally sustainable will lose all credibility if news reports feature pictures of dead fish in rivers polluted by agricultural chemicals; or if visitors see piles of rubbish at natural beauty spots. A destination that purports to be friendly and welcoming will start off on the wrong foot if immigration officials at the airport are surly and uncommunicative. And, if visitors are unable to find information easily on what to do in a destination that claims to be culturally vibrant, they are unlikely to be convinced by such claims.

The visitor should have the destination's brand values reinforced throughout his/her experience in the destination. **Every contact that he/she has with the destination and its people throughout his/her stay**, from arrival at the airport through the quality of accommodation to the welcome he/she receives from ordinary people, will determine his/her perception of the destination. The key points at which the visitor interacts with the destination, and which have the potential to delight or dismay the visitor, are often referred to as 'customer touchpoints' or 'moments of truth'. These 'customer touchpoints' or 'moments of truth' provide the destination with an opportunity to strengthen its relationship with the visitor or to destroy it.

It is important that the NTO realises where these critical 'moments of truth' are likely to occur and can take steps to ensure that the visitor's experience is positive at each of these 'customer touchpoints'. At least, this will minimise the chances of damaging the destination brand; at best, it will reinforce the destination brand values. These 'customer touchpoints' can easily be identified by following a typical journey the visitor might make in the destination. This is referred to as the '**customer journey**' model.

Those responsible for service delivery at critical 'customer touchpoints' will include commercial service providers in the tourism industry as well as local and national government departments that are responsible for public infrastructure provision, such as roads, transport, utilities, immigration, signage, planning, licensing, health and safety, etc.

Once these customer touchpoints have been identified (ideally for all core segments), then the NTO can approach all businesses and organizations who interact with the customer at these critical points to

ensure that they understand the way in which their behaviour or service delivery can affect the visitor's overall impression of the destination. **Intervention** to address this might range from customer service training programmes through quality assurance schemes to brand seminars for critical stakeholders.

In addition to commercial tourism service providers, NTOs need to work with government agencies and other bodies, such as ministries and local authorities responsible for the environment, planning, agriculture, and transport infrastructure, to **make policy makers aware of the needs of tourism**. It is important that all policymakers throughout government are made aware of any impact that their decisions might have on the destination's tourism potential. This is particularly important where their decisions might damage the destination's tourism brand. It is up to the NTO to identify where the critical 'customer touchpoints' lie and who is responsible for delivering the visitor experience at each critical 'customer touchpoint'. The NTO should then develop a relationship with these people, so that tourism interests can be taken into account and any risk to the visitor experience can be anticipated in time to address it.

Examples of 'customer touchpoints' or 'moments of truth'

- Airport arrival: airport layout, design, signage and management (e.g. 'welcoming' images reflecting the country's brand values en route to immigration; immigration; customs; information office; formalities; speed of processing; officials' demeanour and welcome);
- transfers from airport to hotels;
- public transport and taxis;
- accommodation;
- guides;
- inbound tourism operators;
- tourism infrastructure (e.g. roads, telephones, internet access, ease of finding information, value of information, waste management, internal transport, etc.);
- restaurants, bars, etc.;
- shops;
- public realm (e.g. built environment and the way it is looked after and presented);
- natural environment (e.g. appearance, care, cleanliness, etc.);
- residents whom visitors meet during their visit ;
- airport departure (see airport arrival, above).

Managing the Brand

4.1 Introduction

Brand management – Key points

- **Brand leadership** must come, and be clearly seen to come, from the very top: certainly from the NTO chief executive and, ideally, from government too (e.g. minister, prime minister, president).
- A **brand steering group, of approximately six to eight people**, which includes NTO staff and key stakeholders, should be established. Its job is to support the brand manager/guardian in driving the brand forward, maintaining its momentum, monitoring its impact, and deciding when to refresh the brand or rebrand.
- **Internal marketing campaigns** are required to enable NTO staff, commercial stakeholders and residents to understand both the importance and the content of the brand.
- A **brand manager, or brand guardian**, needs to be appointed, with a direct line to the NTO chief executive.
- **Brand champions** and **brand advocates** should be recruited to encourage other stakeholders to understand and adopt the brand.
- **Training** is important for NTO staff, stakeholders, brand champions and brand advocates, so that they know how to apply the brand in their own organizations and marketing communications.
- The **brand toolkit** should form the basis for training NTO staff, stakeholders, brand champions and brand advocates.
- The brand needs **constant nurturing and communication** to remain relevant and comprehensible to stakeholders.

It is essential that key destination stakeholders understand and buy-in to the brand. This includes NTO staff, tourism operators and all who market the country externally, as well as residents. Ideally this should extend beyond the tourism sector to include inward investment agencies, export manufacturers, international business travellers, national sports teams and diplomats, etc. They must feel proud of the way their country is being represented internationally. If they are enthusiastic about the way their country is portrayed internationally, then it will be easier to encourage stakeholders to talk positively and consistently about the brand, to persuade them to reflect the brand in their own marketing communications and to ensure a positive brand experience for visitors in the destination.

The following steps are recommended in order to increase stakeholder understanding of the brand, to achieve their buy-in to its expression, and to encourage them to use it.

4.2 Brand Manager/Guardian

A brand guardian, also known as brand manager, needs to be appointed, with overall responsibility for the destination brand. This will usually be a senior manager in the NTO with a direct line to the chief executive. The chief executive's buy-in and enthusiastic promotion of the brand is critical to its adoption by stakeholders. Brand leadership must come, and must be seen to come, from the very top of the NTO and, ideally, the government.

The brand manager's/guardian's main functions are to:

- **Drive development of the brand.**
- **Maintain the brand's integrity**, ensuring it is used correctly in NTO communications and by stakeholders.
- **Ensure the brand is understood** and regarded positively by stakeholders.
- **Maximise its usage** through as many appropriate channels, and by as many suitable stakeholders, as possible.
- **Manage the development, promotion, and licensing** (if appropriate) of the brand in conjunction with the steering group.
- **Monitor the brand's impact**, identify the need for any **changes** to the brand and implement them (e.g. brand refreshment/rebranding).
- **Act as the key contact point and font of all wisdom on all brand-related issues** for NTO staff, stakeholders, brand champions, brand advocates and the steering group.

4.3 Steering Group

Role: The brand manager's position can be a lonely one, particularly at the beginning when it may be difficult to persuade people of the value of developing a destination brand. This can be true both internally within an NTO and externally amongst important stakeholders, whose future endorsement of the brand is likely to be critical to its success.

It is therefore wise to establish a brand steering group from the beginning. The steering group's responsibility is to support the brand manager, to oversee and advise on the development, implementation and maintenance of the destination brand, and to endorse any changes if the brand needs to be refreshed.

Chair: The brand steering group might be chaired by the brand manager, who will usually be a senior NTO executive. In its early stages it might even be chaired by the NTO chief executive, in order to send a clear message about the importance of developing a destination brand.

Membership: Steering group membership should include key NTO staff, particularly a senior marketing person whose team will have to implement the brand in all marketing communications. He/she can also advise on target segments as well as on practical implementation of the brand.

It would also be wise for the steering group to include key external stakeholders, whose endorsement and adoption of the brand will be critical. These people should be drawn from the inbound tourism industry, the tourism department or ministry, and other influential organizations with a strong interest in the destination's success, such as business, arts, cultural, and sporting organizations. It is useful to include one or two people from beyond the tourism industry who can bring a different perspective, such as a leading branding or marketing professional and/or a senior commercial figure from a non-travel company. This will provide a valuable breadth of experience and an independent perspective.

The calibre of these external stakeholders is as important as their experience. As well as having a commitment to the destination's success, they should ideally have an understanding of branding and

marketing principles. They must also command influence in their own sectors, so that they can act as brand advocates, which will be particularly important in the early stages to bring a wider range of stakeholders on board. Obtaining stakeholders' buy-in to the brand at an early stage is critical. Including key stakeholder representatives in the development of the brand is therefore a fundamental step right at the outset.

Size: The steering group should be small enough to be effective, but large enough to be reasonably representative. An ideal size is around 6 to 8 people. This might include 2 to 3 NTO staff, with the rest coming from the travel industry, government and other appropriate organizations and businesses.

4.4 Internal Marketing – NTO Staff

Before launching a new brand it is important that all staff fully understand and buy into the new brand. This requires a **training programme** to be developed and delivered to all staff.

The **brand toolkit** should be the basis for this training. All staff should have access to the brand toolkit (e.g. through an intranet). They should also have a **point of contact** in case they wish further information on the brand. Usually this would be the brand manager. They should be kept up to date on any changes in the brand, as well as on the NTO's marketing in general.

It is important that all staff are included, not just marketing staff, as this is about inspiring pride, encouraging understanding and promoting usage of the brand.

NTO staff should be the first to hear about the brand proposals, as well as about any subsequent changes if the brand is to be refreshed. For NTO staff, hearing news about their destination brand through the media or external stakeholders can be demotivating. It is no way to obtain their buy-in to the brand and to encourage them to act as brand advocates. Informing staff first and treating them as part of the brand promotion team is an important step towards inspiring a sense of pride in the brand throughout the NTO.

4.5 Internal Marketing – Residents

It is much more difficult to achieve buy-in to a destination brand from residents and citizens, who may be suspicious of the whole process of marketing and branding, than it is with staff. Nevertheless, it is important to include them. Residents can be enthusiastic exemplars of the brand in the way they treat visitors. Most people are proud of where they live and are likely to communicate this to visitors. And, if they feel that their country, region or city is being appropriately promoted by the tourism authorities, they are more likely to be supportive of the brand.

This can be done through a variety of channels, including **community consultation, walk-in roadshows, conferences and the local media**.

However, it is important not just to present the 'expert's' view of the brand. Residents and citizens should have an opportunity to contribute their opinions and influence the development of the brand. **Community consultation** should therefore be undertaken at a stage when they can still influence the development of brand thinking. This would usually be best at the brand development stage, after an initial brand hypothesis has been developed, following consumer research in the destination's key target markets.

This does not mean that residents' views are more important than potential visitors' views. They are not. But an attempt should be made with residents to **narrow any gap between that exists residents' and potential visitors' perceptions of the destination**. This requires an explanation to residents of the importance of consumer perceptions. It is important that residents understand that the visitor always has a choice – whether or not to visit. And the consumer's decision will be based on his/her perceptions of the destination.

Obviously residents cannot be involved at every stage; but it is important to involve them at the beginning and at critical points, as well as to **keep them informed of progress and significant decisions**. Direct involvement by residents is easier at the city or regional level than at national level, purely because of the smaller scale. However, the internet and national media generally offer ways of obtaining residents' views and communicating progress to them throughout a country.

4.6 Internal Marketing – Commercial and other Stakeholders

It is also important to encourage the destination's commercial and other stakeholders to feel proud of the way their country is being promoted internationally. But they are also **potential promoters of the brand** themselves. They can increase international awareness of the destination by including the country's brand values in their own marketing communications. They can thereby extend the brand impact at no additional cost to the NTO. See 2.5.4 *Stretching the Brand through Partnership*.

This requires a rigorous programme, whereby stakeholders are recruited and kept up to date on brand issues. They should also be provided with **clear guidelines** explaining how they can incorporate the destination's brand values in their own marketing communications. This is an intensive process that should be driven by the NTO brand manager. The brand manager promotes understanding and acceptance of the brand amongst stakeholders and encourages them to apply the brand in their own marketing communications.

4.7 Brand Champions

Brand champions are **influential people who command widespread respect** within a broad community (e.g. across sectors and communities at national, regional or city level) and are prepared to passionately champion the cause of the brand at the highest level in public.

They need to be carefully selected for their reputation, their ability to influence at senior levels, their integrity, and their passion for promoting the brand.

Their role is to win the **'hearts and minds' of stakeholders**, persuade them of the value and purpose of the destination brand, and encourage them to use the brand in their own marketing communications.

There is no limit to the number of brand champions. However it is generally better to have a **few high profile champions** than many with less influence.

Brand champions should **target specific groups**, such as the tourism sector, businesses, cultural organizations, and politicians, according to their area of influence.

They should seek to **recruit brand advocates** in their areas of influence, who in turn should recruit others in a cascading effect throughout their own respective sectors and organizations.

The ultimate aim is to **inspire as many people as possible**, who are in a position to use the brand in their marketing communications, to do so – and to do it with passion.

4.8 Brand Advocates

Brand advocates are people who champion the cause of the brand **within their own organizations or spheres of influence**. They operate at a less senior, less public level than brand champions. They tend to be people who have executive authority for deciding whether or not to use the brand in their own organization's marketing communications.

4.9 Brand Seminars

In order to ensure they are equipped to promote the brand effectively and communicate its benefits to stakeholders, seminars should be run for **brand champions, brand advocates, NTO staff, and other appropriate stakeholders.**

The **brand toolkit** should form the basis of these seminars. The number of seminars will be determined by the number of stakeholders that are in a position to use the brand and willing to do so.

Seminars should be run for key stakeholders as soon as the brand is launched. They should also be run on an **ongoing basis for stakeholders** as required to obtain their buy-in, understanding and usage of the brand.

4.10 Maintaining Momentum – Keeping the Brand Fresh

The **lifespan** of a brand has been addressed in 2.5.8 *Brand Lifespan*.

Understanding when to **refresh** a brand is one of the most important tasks for the brand manager. This requires constant **monitoring** of the brand's impact through customer feedback, research and market intelligence. This is addressed in chapter 5 *Measuring Brand Impact*.

The brand manager must work closely with the marketing team to detect any changes in consumer tastes or loss of brand traction. The brand manager must also maintain a keen sense of market trends and a constant, up-to-date flow of market intelligence, so that he/she can instigate any research that might be required to test suspected changes in customer perceptions or weakening of brand values.

Measuring Brand Impact

5.1 Introduction

Measuring brand impact – Key points

- **Measuring brand impact** is essential to understand how the brand is perceived. This will help the NTO identify where and when any change is required to the brand.
- The most important issues to understand are
 - **Brand differentiation:** To what extent is the destination perceived as truly different from others, particularly competitor destinations?
 - **Brand esteem:** How do people in key target markets regard the brand?
 - **Changes in perception:** Do perceptions of the brand change, positively or negatively, over time?
- Brand impact should be measured at **regular intervals**. Changes in brand perception are only likely to be picked up over time, not instantaneously. Therefore brand-tracking surveys should be undertaken approximately **every two to three years**.
- The main **techniques** for measuring brand impact are:
 - Brand-tracking surveys;
 - online panel surveys;
 - questions in Omnibus-style surveys (certain countries only);
 - international benchmarking surveys;
 - visitor satisfaction surveys;
 - media monitoring.

It is important to know that the brand is working and remains inspirational for visitors. If a brand loses impact, it is important to identify the reason why this has happened, so that an appropriate solution can be implemented. The table below provides some insight into some of the **main reasons why a destination brand might lose impact**.

Table 5.1 Brand impact: Problems and solutions

Problem	Solution
The way in which the brand is reflected in marketing communications is insufficiently powerful, attention-grabbing or differentiating .	This requires a creative marketing solution , rather than a brand solution. It may require a change of marketing/advertising agency, a change in the NTO marketing approach or just a radical refocusing of the way in which the core brand values are expressed.
The values are inappropriate for the segments the destination is targeting.	The NTO will need to decide whether the destination can still appeal to these segments, or whether it should target different segments. If these existing segments still offer potential for the destination, then a review of the brand values is required to identify what will most appeal to these segments.
Consumer tastes have changed.	If the destination can no longer offer what consumers now want, it should 'cut and run' and identify new segments who will find the destination appealing. However, if there is a chance that the destination might still appeal to people's changed tastes, then research is likely to be required to identify their core motivation, followed by a review of the brand's relevance . This may result in a need to refresh the brand; or it might require a complete, radical rebranding of the destination.
The brand, and its promise, have become tired .	The brand needs to be refreshed .
New market segments have emerged and the brand fails to inspire them.	Same as for changed consumer tastes above.
Increased competition in the marketplace from new destinations or refocused brands	Same as above – refreshment of the brand to help it stand out from the competition.

Ensuring the brand remains fresh and relevant to potential visitors requires regular measurement of the brand's impact. This can be done through one or more of the following mechanisms. These are listed in order of cost, from most expensive to least expensive.

5.2 Brand Tracking Surveys

These measure the impact of the brand, usually in the following ways:

Brand differentiation:

- To what extent is the destination perceived as somewhere that is different from its competitors?
- What are its distinctive differentiating features at both a rational and an emotional level?

Brand esteem:

- How well-regarded is the destination?
- How do people perceive it?
- How do they perceive it in relation to other destinations?
- How committed are they to the destination?

Whilst it is relatively straightforward to measure the differentiating features of a brand at the rational level, obtaining a full understanding of the emotional impact is a much more complex problem. Within a quantitative brand-tracking study, it is impossible to expect consumers to be able to answer questions relating to the impact of the brand at an emotional level – instead, questions have to be asked more indirectly to help to assess the brand's emotional impact. This requires careful drafting of questions and the use of appropriate analysis techniques (e.g. qualitative research) in order to elicit people's true feelings about the brand.

- Measuring **emotional commitment** to a brand is complex.
- Various **research approaches have been developed for consumer product brands and adapted to the tourism destination environment.**
- Interestingly not all have been developed specifically for the commercial, fast moving consumer goods markets: an approach by research company TNS to measuring brand commitment, the '**conversion model**', has its roots in the study of religious commitment in South Africa in the 1960s.¹

It is important, in brand tracking, to measure the brand's impact at regular intervals. This will indicate any significant changes in people's perceptions of the brand. Destination brand tracking surveys are most effectively undertaken **every two to three years**. It is unlikely that significant shifts in perceptions of a destination brand will be discernible over a shorter period of time.

Brand tracking surveys offer the greatest insight into how the brand is performing in the destination's key target segments, regardless of whether these people have visited the destination or not. They can also provide an **early warning signal of the brand's decline** and alert the NTO to the possible need to refresh the brand.

But NTOs should be careful to ensure that any such signals are genuine indicators of brand decline and are not just a reflection of, for instance, a reduction in destination marketing spend or other isolated transient phenomena, such as negative news coverage of one-off or unusual incidents (e.g. political upheaval, terrorist attacks, natural disasters, etc.). There are so many factors affecting people's perceptions of a destination that a reduction in NTO marketing spend is unlikely to account for a significant decline in awareness of the destination.

It is also important for the NTO to identify any significant influences that might have temporarily raised the profile of the destination, such as high profile movies featuring the destination (e.g. *Lord of the Rings* – New Zealand; Baz Luhrman's *Australia*; *Braveheart* – Scotland; *Slumdog Millionaire* – India).

Traditionally, ad hoc brand tracking studies have been undertaken by telephone or face-to-face, but an online approach, utilising research panels is becoming increasingly popular and is explored below.

Glasgow identified a 13% swing in its favour over a two year period amongst one of its key United Kingdom market segments 'early style adopters'.²

The research was designed to track the effectiveness of Glasgow's "*Glasgow: Scotland with style*" brand positioning. Respondents in this key market segment were asked the same question – "What United Kingdom and European cities would you consider visiting?" – in year 1 and then again two years later.

1 <http://www.conversionmodel.com/content.asp?page=home&head=home>.

2 <http://seeglasgow.com/index.asp?pgid=11519>.

While some of this change in goodwill may be attributed to Glasgow's brand marketing campaign and related media coverage, it is difficult to isolate the brand campaign's impact from the effect of Glasgow's winning the bid to host the 2014 Commonwealth Games during the period over which the research was conducted.

Nevertheless, regardless of the reasons, the critical point is that the survey showed the brand in good health, with its key brand values of 'stylish Scottishness' or 'Scottish style' clearly resonating and growing amongst one of its main target segments.

5.3 Online Panel Surveys

In recent years, an online, panel-based approach has become an increasingly popular way to measure a brand's performance. Research panels are essentially large volumes of respondents who are recruited by research agencies to become respondents in major surveys. Their details are known by the research agency (demographics, media-buying, travel characteristics, etc.) and hence, where there is a need to undertake research with a specific sample of the population, a sample of respondents who qualify can be readily identified. The Glasgow example above used just such an approach – it enabled the identification of respondents who qualified on key lifestyle criteria.

Online panel surveys also provide a useful method of accessing customers and potential customers, who can sometimes prove difficult to reach.

The main advantages of online panel surveys are:

- Research can be targeted on a specific demographic segment (unlike Omnibus surveys – see below).
- They are one of the least expensive ways of obtaining people's reactions to a destination.
- The online approach makes it straightforward to incorporate images, sound and video clips to help obtain prompted measures of brand awareness.

Online panel surveys can also ask more questions, as they can be slightly longer than Omnibus, telephone or face-to-face approaches; they are less restricted by some of the 'time to complete' issues of interviewer-administered surveys. Nor do they suffer from any 'interviewer-induced' effect, which might influence the direction a focus group takes, as they are based on self-completion questionnaires. On the other hand, they do not permit the extent of in-depth emotional investigation that can be undertaken by a live interviewer undertaking a face-to-face brand tracking survey.

5.4 Omnibus-style Surveys

'Omnibus' refers to a type of quantitative survey undertaken across a broad audience range, in which data on a wide range of topics and products is collected during the same interview on behalf of several (often many) different clients. This type of survey offers the opportunity to ask limited, specific, relatively simple questions. It is less targeted to any particular market segment than an online panel survey. It therefore does not lend itself to eliciting the qualitative insight that can be obtained from brand tracking surveys (see above) online panel surveys (see above) or visitor satisfaction surveys (see below). It is, however, considerably cheaper to insert one or two questions in a regular Omnibus-style survey than it is to undertake a full brand tracking or visitor satisfaction survey. The Omnibus-style survey can, however, complement these qualitative surveys and provide an element of reinforcement (or possibly contradiction) to the findings from qualitative research.

Omnibus-style surveys are probably best suited to asking questions about **awareness of, and attitude towards, the destination**. Answers to this question can then be measured over time by inclusion of the

question in the Omnibus-style survey on a regular basis. They can complement, or act as a lower-cost and less detailed, alternative to a full-blown brand-tracking survey. But they are most effective when combined with qualitative surveys (e.g. brand tracking surveys and visitor satisfaction surveys), rather than as a stand-alone indicator of brand impact. They also provide the simplest and most effective means of measuring propensities (e.g. to travel, etc.) within a population, as all such surveys are representative of the market population in question.

Omnibus style surveys only exist in certain countries.

5.5 International Benchmarking Surveys

There are two main forms of international benchmarking survey:

- The **NTO can undertake the survey itself**. This is quite expensive and time-consuming if a genuinely significant set of global comparator destinations is to be assessed. Of course the NTO can restrict the survey to its closest competitors, which will reduce the size of the sample, keep the costs lower, and enable the NTO to elicit tailored information that focuses on its core competitive strengths and how its competitors perform against each of these.
- The **NTO can buy into an independent global benchmarking survey** that assesses countries on a fixed set of criteria. These tend to compare nations and cities across a range of criteria that generally relate more to the broader image of a place, covering major economic sectors and public image, rather than looking at the country purely as a tourism destination, although they do also include questions about the place's image from a tourism perspective.

Example 1: The Anholt-GfK Roper Nation Brands Index and the Anholt-GfK Roper City Brands Index ask questions about people's perceptions of countries and cities in five key areas: exports, governance, culture and heritage, people, tourism, investment and immigration.

For more information, see:

- www.nationbrandsindex.com
- www.citybrandsindex.com

Example 2: The Future Brand Country Brand Index analyses countries according to eight dimensions:

Wants:

- Attractions;
- authenticity;
- culture;
- ethos.

Needs:

- Geography;
- infrastructure;
- governance;
- economy.

For more information, see: www.futurebrand.com

The main value of such independent benchmarking surveys is for comparing a nation's or a city's **overall** competitive position to others. They are primarily a measure of the place's economic competitiveness. They show where a country's main strengths and weaknesses lie in terms of international public perception. And they contain an interesting analysis of how places compare in specific areas (e.g. governance, culture, tourism, ethos, infrastructure, etc.), which are significant in forming people's impressions of the place, particularly those who have never visited or had any exposure to the country through doing business with it.

However, it is important to remember that these surveys provide information at a generic level across a wide audience spectrum. They do not necessarily reflect the perceptions of a destination's key target audience of potential visitors, which might be quite different, as a result of their greater knowledge of the destination's tourism assets. Nevertheless they do provide useful insights into general perceptions of the country, which may represent the views of people who could be potential visitors if some of these perceptions were either reinforced or counteracted.

5.6 Visitor Satisfaction Surveys

Visitor satisfaction surveys are, along with brand tracking surveys, the main sources of valuable **qualitative** insight into how the brand is performing. They enable the NTO to tailor a number of different questions to elicit responses from visitors about their experience in the destination and, to a lesser extent, their attitudes towards it.

Obviously, being a **survey of visitors only**, such surveys do not provide any insight into how the destination is perceived by those who have not visited. But, when combined with brand tracking surveys, a relatively comprehensive picture of the brand's performance can be obtained.

As with brand tracking surveys, visitor satisfaction surveys should be undertaken at regular intervals, and ideally every year. An **annual visitor satisfaction survey** will not only help measure brand performance, but perhaps more importantly, it provides an opportunity to identify any product deficiencies that can be remedied immediately. And, by identifying what visitors liked and disliked about the destination, it can also provide insights that might be helpful in adjusting future marketing messages.

It is important to remember that the visitor satisfaction survey will be more oriented towards establishing what visitors liked and disliked about their holiday experience than it will be revealing about their deeper emotional reaction to the brand. However, the combination of a visitor satisfaction survey with a brand tracking survey is a potent source of insight for the destination to understand its customers and identify what it needs to do to improve its relationship with them.

5.7 Monitoring Media Coverage

Media coverage can be positive and negative. The main aim of monitoring media coverage is to measure the volume of positive press coverage of the destination in key markets. However, it can also be instructive to monitor negative media coverage, as sustained negative coverage can damage the brand. Negative media coverage can provide an early indication of a decline in brand resonance. Such early warning signals should alert the brand manager to watch for further signs of the brand growing tired or losing traction.

But the main aim of monitoring media coverage is to assess the positive impact of the brand. The extent of brand-compliant coverage can be assessed by identifying the number, quality and reach (in terms of market penetration amongst key target segments) of articles, broadcasts, etc. that feature on-brand messages which reflect the destination's brand values.

This is usually undertaken by a PR agency or press monitoring service. Results can be expressed in terms of 'advertising equivalent value' (AEV). However, it is important to **differentiate between positive and negative media coverage** when using this measure to assess brand health. Otherwise negative coverage

added to positive coverage will give a false total in terms of advertising space equivalence. However, negative coverage can, if desired, be subtracted from the total amount of positive media coverage to give an indication of overall brand impact. The important thing is to undertake **qualitative analysis of the articles and weight the nature of the coverage according to branding and marketing priorities.**

Weighting media coverage

- Brand-compliant coverage that **reflects the destination's brand values** will be more valuable than coverage that merely lists things to do in the destination and doesn't convey any elements of the destination's brand values.
- Similarly brand-compliant coverage that appears in media that reach **people in the destination's key target segments** will be more valuable than coverage in less targeted media.
- The ideal is to achieve positive, brand-compliant coverage that appears in media that reaches **as many people in the destination's key target segments** as possible.

Branding Strategies in Action

6.1 Introduction

This chapter looks at how brands have worked in different places. It aims to provide further insight into the practice of branding through an exploration of different branding approaches that a variety of destinations have taken.

Its focus is on destination branding; but it also demonstrates how several countries are integrating destination branding within the wider context of nation or place branding, which is the route that countries, cities and regions will increasingly follow.

It is an eclectic mix of case studies – both countries and cities – which illustrate the application of branding in the following situations:

- **How can a small country punch above its weight?** (Wales)
- **Overcoming the disadvantage of remoteness** (New Zealand)
- **National image as a unifying force after conflict** (Bosnia and Herzegovina)
- **Projecting brand values through imagery and tone** (Netherlands, Ireland, Australia)
- **Can a destination change its image?** (New Zealand, Spain, South Africa, Colombia, Australia, Glasgow)
- **The power of events to influence brand image** (Germany)
- **Similar but different – Breaking away from the chains of a regional image** (Estonia, Latvia, Lithuania)
- **Internal branding – Convincing your own people** (Namibia)
- **Place-branding – Uniting partners to cooperate on an international stage** (Lyon)

These case studies illustrate the impact of other factors well beyond an NTO's control, which can significantly influence people's perceptions of a destination. This recognises the real world in which destinations live, and the external influences with which they need to work to manage their destination's image. In other words, it recognises that NTOs can nudge, and often ensure consistent presentation of, a destination's image, but they cannot invent it or totally control it.

But what they have in common is that they have all used the brand as an important tool to help transform their nation's or city's economic potential, whether just as a tourism destination or across the economy of the whole place.

6.2 Case Studies

Case study 1: How can a small destination punch above its weight? – The Wales challenger brand

The former Wales Tourist Board recognised, as a small, relatively undiscovered country with limited marketing budgets compared to its competitors, that Wales had to market itself differently to attract attention. This led Wales to adopt a 'challenger' brand approach, whereby it had to act and think

differently. The key features of a challenger brand that the Wales Tourist Board¹ identified as important were:

- **Acting and thinking differently** by challenging convention and assuming thought leadership in their approach to destination marketing.
- **Creating a strong ‘lighthouse identity’**, which highlights what the brand stands for in a way that no one can miss.
- **Being absolutely focused.** This meant they should “sacrifice activity in certain areas and [be] brave enough to overcommit in those areas where they believe they will make areal difference.”²
- **Being ideas-centred** and expressing them in a way that engaged consumers. This was about constantly refreshing relationships with consumers in a way that made them feel involved as participants in a relationship with Wales, rather than just as consumers who were marketed to.
- **Creating debate and discussion** via Visit Wales’s paid-for communication (e.g. advertising, etc.), thereby generating additional media coverage.

This meant adopting a ‘challenger approach’, which was reflected in all marketing communications by the Wales Tourist Board.

However, the challenge was not just for the ‘challenger brand’ mentality to be evident in all marketing communications by the Wales Tourist Board, but it should also be expressed in the behaviour of its staff: there was a conventional way of doing things and a Welsh way, which should be recognised as different, intelligent, credible and respected. What was also significant was that this was building on a long-existing streak of independent spiritedness amongst the Welsh. Adopting a challenger brand mentality would be much more difficult in a country that was more tied to convention or bound by social formality. It needs an inherent propensity to challenge convention and a will to back this up through action, not just in official marketing communications but also in behaviour by ordinary people, for a challenger mentality to gain traction.

In the early 2000s Wales had begun to carve a niche for itself as an accessible adventure sports destination within the United Kingdom. Against the odds Wales successfully bid to host arguably the most prestigious golf event in the world, the Ryder Cup. So it set about competing with the established giants of golf tourism, Scotland and Ireland, using a challenger brand approach.

Wales presented golf in Wales as the antidote to golf in its established competitor destinations. It promoted the benefits of Welsh golf as unhurried, unstuffy, value for money, accessible, and scenic. The first three – unhurried, unstuffy and value for money – were a direct swipe at its more established competitors, such as Scotland and Ireland, which is where Wales perceived its main competitive advantage to lie. This was clever competitive positioning which, while not explicitly denigrating its competitors, did so in an amusing, slightly cheeky but engaging way that brought the audience along with the spirit of the advertisements.



1 Pride, R. (2002), 'A Challenger Brand: Wales, Golf as it Should Be', in: Morgan, N., Pritchard, A. and Pride, R. (eds.), *Destination Branding – Creating the Unique Destination Proposition*, Elsevier Butterworth-Heinemann, Oxford.

2 Ibid.

The strapline “Golf as it Should Be” presented golf in Wales as the antidote to its competitors: “the seriousness of Scotland, the corporateness of England, the booziness of Ireland.”³ The challenger brand mentality did not stop with advertising. It ran through all marketing, with innovative and unexpected messages and techniques: from merchandise, such as smiley-faced golf balls, to “Golf as It Should Be” messages at the bottom of golf holes, which greeted golfers collecting their balls at the end of each hole.

Was it successful?

A golf monitor established to measure the volume and value of golf in Wales showed that golf numbers increased year on year from an estimated 30,000 before the Ryder Cup bid to around 90,000 in 2008. Wales is on course to reach its target of 100,000 visitors by 2010. And Wales was voted “Undiscovered golf destination of the year” in 2003 by the world’s golf travel writers.

While Visit Wales led with the ‘challenger brand’ approach in its tourism marketing, it was not restricted just to tourism. Wales extended the ‘challenger brand’ mentality across all sectors, including inward investment and export promotion, as a guiding principle in promoting Wales. This aimed to ensure that Wales spoke in the same tone of voice in all its marketing communications across all sectors and that visitors and business people experienced the same engaging and intelligently unconventional spirit in the people they met and in the way they experienced the country when they got there. The way in which Wales communicated with its key audiences, particularly the style of communication and tone of voice, were fundamental to the application of the Welsh ‘challenger brand’ (see <http://UK.youtube.com/watch?v=xrOgtIHivQ4>).

Conclusion – Wales

- **Being different can be distinctive:** Less well-known destinations can create impact by acting and thinking differently and challenging conventional ways of doing things.
- **A ‘challenger’ mentality has to be real:** It has to be inherent in the people and embedded in the way they do things and the experiences that visitors will encounter. Otherwise it will come across merely as an empty slogan.
- **A ‘challenger’ mentality requires courage:** It requires courage to maintain a single-minded focus on the challenger approach. This sometimes means sacrificing the promotion of ‘cash cow’ segments or traditional national icons in order to establish a reputation for being different. Clear arguments are likely to be required to explain the reasons for this to stakeholders in the tourism industry, the media and politicians.
- **A challenger approach requires commitment:** Results take several years to appear. As with any brand presentation, a challenger approach has to be given the chance to achieve impact.

Case study 2: Overcoming the disadvantage of remoteness – New Zealand

New Zealand had a rather staid image as a tourism destination up to the 1980s. Its position at the other end of the world from its main tourism-producing markets, apart from Australia, in Europe and North America compounded New Zealand’s difficulty in growing its tourism.

New Zealand tackled these significant constraints by a concerted effort to change its image over several years. This was backed by a boom in youth travel to New Zealand and a consequent growth in demand for adventure activities. New Zealand’s positioning as a ‘natural’ destination, expressed in its “100% Pure” slogan caught the imagination of international travellers.

3 Ibid.



But it was the long-term commitment to this brand positioning, which had initially been inspired by food producers and agricultural exporters responding to a change in New Zealand's economic situation that enabled New Zealand to stand out and claim the competitive high ground as a natural, environmentally sound destination.

Conclusion – New Zealand

For a more detailed analysis and conclusions, see the New Zealand case study under *Can a Country Change Its Image?*

Case study 3: National image as a unifying force after conflict – Bosnia and Herzegovina

In 2006, just over a decade after the end of the war in Bosnia and Herzegovina (BiH), a USAID⁴-funded tourism project produced a short promotional film about the country, entitled *Enjoy Life*. Although this had limited exposure, it was aired in advertising slots throughout Europe on CNN. The remarkable, and unexpected, spin-off from this was a sense of national pride amongst people in the country's two separate entities⁵, Republika Srpska and Bosnia and Herzegovina.

After so many years of conflict and political tension in the post-war period, it was refreshing for people to see a positive take on the country. And it was particularly reassuring to feel that the country could be presented positively to the outside world. Many residents expressed surprise and incredulity that Bosnia and Herzegovina could ever be seen as a tourism destination, particularly in the aftermath of war. But, along with the commitment of a few inbound tourism operators, who saw an opportunity to develop BiH's tourism product, a belief began to be generated in a more prosperous future for the country.

Another important element was that the *Enjoy Life* advertisement reached out to the Bosnian diaspora across Europe and inspired a very positive reaction. This was significant in that it opened up an opportunity, through the presentation of a positive message about Bosnia and Herzegovina, to raise interest in, and hope for, the country's development amongst a second, and economically stronger, Bosnian émigré generation.

Clearly, many other factors were also at work. But the role of tourism was significant – both as an opportunity for development and as a mirror to reflect the country's image back to its own people. This will be critical to the development of national self-confidence and the country's development as a tourism destination. And to begin with, the country's brand will perhaps be more significant for its own residents than for visitors. But that should cement residents' belief in a more prosperous future, as well as their buy-in to the way in which their country is promoted internationally – a solid basis for the brand's, as well as the country's future.

Film: <http://UK.youtube.com/watch?v=rinQSOVUvrU>

TV ad: <http://UK.youtube.com/watch?v=PFXc-zBXpgM>

4 United States Agency for International Development.

5 Separate administrative areas below state level.

Conclusion – Bosnia and Herzegovina

- **Unexpected consequences can be quite significant:** Clearly, by their very nature they can not be planned for. But, once something unexpected happens that is positive, it is worth reconsidering the original strategic motive to assess whether further investment or other activity is warranted to perpetuate these benefits, even though they weren't originally intended.
- Sometimes, revealing how outsiders see a country can provide the spur that is needed to **inspire residents** to focus on finding a shared vision for their own country.
- **A destination brand has a powerful relevance internally within the country, as well as externally amongst potential visitors:** In Bosnia and Herzegovina's case, there may not have been funding to continue airing the advertisement on CNN for many more months. But, having identified its unexpected benefits in terms of bringing people throughout a previously divided country together in a shared sense of national pride, there was clearly a value in using the advertisement internally within Bosnia and Herzegovina. Senior officials and others from all parts of Bosnia and Herzegovina who saw the advertisement on CNN expressed a pride in the way that their nation was being projected internationally. They endorsed the underlying values portrayed in the advertisement, which provided a refreshing counterpoint to the recent worldwide television coverage of Bosnia and Herzegovina, which had been entirely dominated by war footage.
- **Brand values are enduring:** The advertisement showed a different, and enduring, truth about the country: friendly people, centuries of fascinating cultural heritage and tradition, wild nature and adventure sports activities, which both transcended the centuries and provided a glimpse of a possible alternative future. Importantly, from the perspective of the destination brand, these represented what Bosnia and Herzegovina had always had in terms of nature, culture, history and heritage. They represented the country's enduring assets on which its brand appeal could be rebuilt.
- **A destination brand can unite people:** The first opportunity was therefore to encourage different parts of the country to unite behind a common set of shared brand values in the way that it presented itself as a destination internationally. The second opportunity was to create a shared basis for dialogue about the future development of tourism. The third opportunity was the positive reaction it inspired amongst the émigré Bosnian Diaspora across Europe, who were both potential visitors and investors.

This provided a significant opportunity to highlight the potential of tourism to contribute towards economic growth throughout the entire country. And, by demonstrating the potential benefits for the whole country, it also, hopefully, created an objective basis to help bring disparate communities together with the common aim of developing economic prosperity through tourism.

Case study 4: Projecting brand values through visual imagery and tone – Netherlands

The Netherlands, which is promoted as Holland in English-speaking markets, uses its national colour, orange, uncompromisingly and very powerfully in all its marketing communications to brand itself.



However, a subtle subtext also runs through the Dutch branding above, which is the theme of culture. The work of famous Dutch artists is amusingly but subtly referenced in each advertisement. The advertisement on the left echoes Van Gogh's *Sunflowers* painting; and the advertisement on the right echoes Vermeer's *Girl with a Pearl Earring* painting, which was also the title of a popular film at the time this advertisement ran. The way in which this is presented also suggests an engaging and inclusive manner. It is as if the Dutch are sharing the joke with readers by assuming a certain level of artistic knowledge and therefore including them, while still informing them about Holland's unique culture.

Clearly this will only work amongst the right target segment and will be lost on those who are not interested in art. But then, it is likely that Holland is not particularly interested in such people either, as they are less likely to visit the country. So, in one image, Holland has conveyed very clearly and simply three important brand values, demonstrating that the country and its people are cultural, engaging and humorous.

Conclusion – Netherlands

- Clever use of **visual imagery** is one of the most effective ways of projecting a destination's brand values.
- **Colour**, particularly a national colour, can inspire recognition amongst consumers and thereby reinforce the destination brand.
- It is difficult to differentiate a destination on the basis of **cultural brand values**, as most destinations offer culture as one of their greatest assets. However, it can be done through well-crafted creative execution.
- **Humour** is difficult to convey in a marketing campaign as a brand value. It needs to be sensitively presented, so that it is neither lost nor over-bearing. It works best when the audience is, implicitly, invited to share in it. Where this is a niche audience, there is always a risk that those who do not share the humour will feel excluded. It is important to avoid excluding people in other segments who may also be in the destination's target market.

Case study 5: Projecting brand values through visual imagery and tone – Ireland

Ireland has consistently, and very effectively, projected its core brand values of authenticity, engaging friendly people and ‘the craic’ (a mix of fun, hospitality and witty conversation) in a modern European society against a background of traditional culture throughout its destination marketing.

Authenticity is one of the hardest messages to convey in paid-for marketing. The advertisement below effectively manages to convey the authenticity of the situation, as this is clearly not a staged cultural show that has been set up for visitors. It is obviously a genuine local event in a regular pub upon which “Sofia Rossi from Milan” (in red top) and her friends have stumbled.

The wall plaque (which reads “It was in this very pub that Sofia Rossi on holiday from Milan first discovered Guinness”) conveys a gentle sense of humour, which it shares with the reader, thereby including him/her in the engaging tone of the situation: the use of a plaque, which is more familiar as a means of commemorating famous historical figures, to commemorate Sofia’s visit and her discovery of Guinness, transmits the brand value of engaging humour.



Conclusion – Ireland

- Showing visitors from a destination’s core target segments in a **real, rather than staged**, situation can be a useful way of conveying an impression of authenticity.
- However, this needs to be **carefully and sensitively executed in the creative treatment**; otherwise it will look false and uninspiring.
- **Creative devices**, such as the plaque on the wall, can be used to reinforce brand values (engaging humour) in a way that would otherwise appear cumbersome and lack impact if it was merely consigned to the supporting text of the advertisement.

Also, see Australia below under *Can a Destination Change its Image?*

Can a destination change its image?

One of the common threads running throughout the case studies below relating to destination image change is the **holistic approach to image change**: most of these image changes, which have been quite radical, have been inspired by a need for wider economic and political change, rather than just tourism. Nevertheless, this illustrates the important link and opportunities for synergy between the concept of ‘destination’ and ‘place’.

Case study 6: Can a destination change its image? – New Zealand

Up to the 1980s, New Zealand was widely seen as a rather old-fashioned, remote place, full of green hills, sheep and aggressive Maori warriors, to which people emigrated, but not as a significant tourism destination. It has now captured the world's imagination as the world capital of adrenalin sports, adventure tourism and as one of the most natural and 'green' destinations in the world. And it is widely seen as one of the world's strongest and most admired destination brands. Respondents to our survey (see annex 1 *NTO Branding Practices*) voted New Zealand as the best exemplar of destination branding in the world. In short it is 'cool' both as a place to visit and as a global role model of destination branding and marketing.

So what changed?

Several key factors, plus timing, accounted for this remarkable transformation:

- New Zealand was forced to implement **economic reform** in the 1980s as a result of changing global economic conditions, including the loss of its preferred trading status with Britain, on which it relied for a large proportion of its export market, following Britain's entry into the European Economic Community. New Zealand exporters recognised the need to develop a strong brand to promote a reputation for quality if a country that was at the other end of the world from its former main export markets was to have a chance of competing on the world stage. They also recognised the value of New Zealand's clean, natural environment as a brand asset. The *New Zealand Way* was born, driven by the private sector, but as a partnership between the private and public sectors. Its aim was to reposition New Zealand's international image for quality goods – particularly natural produce – sport and tourism. The *New Zealand Way* is still recognised today as one of the world's great nation-branding, as opposed to merely destination-branding, successes.
- A focus on the **natural environment** as New Zealand's core proposition ran through everything from agricultural produce and tourism to the way people thought and behaved. New Zealand is not unique in having a commitment to an unspoilt natural environment and quality produce. But it has managed to capture the world's imagination with its consistent branding that has, for many years, put natural values firmly at its core.
- **Clear values** were articulated, which included: quality and excellence; achievement; environmental responsibility; honesty, integrity and openness; cultural diversity. These were updated about ten years later to: new Pacific nation; entrepreneurial spirit; globally connected; resourceful; space and openness.
- **Stories** were created around the landscape, the people, adventure and culture. The positioning was contemporary and creative, spirited and free. These stories were set against the backdrop of New Zealand's stunning natural landscape, which gave energy to the scenery and repositioned the image of the country from boring and non-descript to fizzing – the adventure capital of the world.
- The growth in New Zealand tourism was largely **youth-driven**. The boom in youth travel, and particularly 'gap year' tourism by young British people taking a year out to travel before going to university, created a demand for outdoor adventure products, which New Zealand rapidly filled.
- Also significant was a '**can-do**' attitude and an innovative approach to developing outdoor adventure products and extreme sports (such as bungee-jumping, white water rafting, zorbing, jet-boating and other aerial, water and land-based activities). Coupled with more traditional adventure activities, such as hiking and skiing and the marketing of iconic routes, such as the Milford Track, a critical mass of adventure opportunities emerged in New Zealand.



- The **Lord of the Rings** trilogy was filmed in New Zealand. These films captured the popular imagination around the world. New Zealand provided the requisite awe-inspiring scenic backdrop for 'Middle Earth' in the film, which maintained the momentum that New Zealand had already developed as a destination. Significantly major New Zealand partners threw considerable weight behind high profile destination promotions linked to the movies: Air New Zealand featured itself as "the airline to Middle Earth" and Wellington Airport positioned itself as the gateway to Middle Earth, with a huge figure of one of the central characters, Gollum, towering over the airline terminal.

Conclusion – New Zealand

- **Circumstances are important, but opportunities have to be created:** The combination of a worldwide growth in demand for adventure and active outdoor tourism products, a relatively unspoilt natural environment, innovative product development, and movie location might have been fortuitous in terms of timing. But New Zealand grasped this opportunity and committed to a clear marketing proposition, based on a strong set of brand values, based on nature and adventure, which were vigorously and consistently marketed (slogan = "100% Pure").
- **Finding a strong, single-minded proposition that unites different sectors can be very powerful:** The original motive may have been to recover markets for New Zealand's agricultural produce, but the 'natural' angle translated powerfully into tourism. The natural environment, which was essential both to the quality of New Zealand's agricultural produce and to its adventure tourism offer, provided a credible and powerful backdrop against which to market products from these different sectors.
- **Partnership and commitment are essential:** But this was not enough. How many other countries have a wonderful natural environment, quality agricultural produce and great adventure tourism opportunities that could have also done this? It took partnership across different sectors, commitment to well-resourced marketing campaigns, and the courage to stick with the core idea (natural) for several years, to enable New Zealand to gain its present position in people's consciousness as the world capital of adventure tourism and unspoilt natural scenery. It also took a determination to drive an understanding of the brand amongst tourism businesses throughout the country, a commitment to develop tourism products that reflected these brand values, and a passion to ensure that they were felt by visitors in the way that they experienced the destination. This is what transformed New Zealand from a nice, natural destination to one of the most aspirational destinations and most admired national brands in the world.

- **Creatively interpreting a nation's brand assets is fundamental.** Create stories around the brand's positioning. It also helps if there is a sense of coherence across different sectors:

"New Zealand has undoubtedly benefited from vigorous, well-coordinated and unusually thoughtful promotional campaigns for its products, tourism and inward investment offerings (under the single banner of 100% Pure New Zealand). They didn't turn into Australia or the UK and they have remained true to their assets. In that sense they understand branding better than most."^a

- **Finding new ways to maintain momentum is important:** Once the process of changing people's perceptions has begun, every opportunity must be sought to reinforce the new brand values. Although *The Lord of the Rings* remains strongly associated with New Zealand and is credited for having extended New Zealand's fame as a destination, it really was the 'icing on the cake'. The movie came along after, and built on, the natural elements of brand New Zealand. But, the way in which New Zealand as a nation embraced the opportunity offered by the movie and worked together to exploit it, enabled New Zealand to maintain its momentum. The *Lord of the Rings* films had caught people's imagination around the world. Marketing campaigns promoting awareness of New Zealand as the films' location widened its destination appeal, all the while emphasising the country's core natural values.

a) Simon Anholt, Country Brand Index

Case study 7: Can a destination change its image? – Spain

Spain had been a major beneficiary of the growth in international travel in the 1970s and 1980s. But Spain's enthusiastic response to northern Europeans' appetite for sun, sand and sea had led to overdevelopment along Spain's coastline, representing one of the world's most glaring examples of mass tourism. Spain's *costas* catered for northern European, and particularly British, tastes, which were far from cosmopolitan. A home-from-home was created for British tourists, whereby British pubs, British menus and British holiday representatives provided a familiar environment that stripped the *costas* of their Spanish sense of place.

By the early 1980s Spain had a largely negative image in northern Europe as a cheap, booze-fuelled beach destination that was unappealing to higher spending travellers who were more interested in indigenous nature and culture and experiencing somewhere different when they travelled. For them Spain was not even a consideration. But just a few miles inland the real Spain remained largely unvisited.

Spain took a brave decision in the early 1980s to take a radical turn and focus its international marketing on culture and the interior. It promoted a contemporary artistic Spain alongside its cultural heritage, focussing on icons such as the Prado in Madrid, the rich variety of its cities such as Barcelona, Seville, Santiago de Compostela, and quality accommodation in former castles, manor houses and monasteries (*paradores*). A new vibrant, innovative and distinctive *España – el sol de Miró* logo was created, by famous Spanish modern artist Joan Miró, using a combination of the colours of the Spanish flag.



Suddenly a new image of Spain was launched to the world – cultural, 'cool' and contemporary.

Later, different regions of Spain, such as ‘green Spain’ in the north, and beach destinations such as Menorca and the Canary Islands, were reintroduced under the new brand. While the creative style of its advertising campaigns changed over the years, its brand values remained consistent. Then, gradually, Spain took a back seat, leading with its different regions, but always retaining a clear sense of Spanish identity through prominently featuring the highly distinctive and widely recognised España – *el sol de Miró* logo and, later, the “Smile” device (see advertisements below). Spain had performed a remarkable rebranding, which had not only retained its traditional beach market, but also introduced a different Spain in all its regional glory to new markets, who would previously not have even considered Spain for a holiday.



Conclusion – Spain

- Understanding current trends and recognising existing assets are important:** Spain, like New Zealand, was in part fortunate in terms of timing, which enabled it to tap into a growing demand for more cultural and outdoor tourism products in its main source markets. It was also able to deploy significant marketing resources to promote its new image; and, in the work of artist Joan Miró, it had an internationally recognisable body of distinctive modern art from which to draw inspiration for its new logo. But none of these should deflect from the genius or determination required to blend these elements into a successful recipe, which transformed the image of Spain as a rather downmarket beach destination to a multi-faceted, cultural, sophisticated destination for an entirely new market of holidaymakers.
- A new approach can refresh existing products:** It is also important to recognise that Spain's former 'cash cow' – beach holidays – have continued to be a mainstay of Spain's tourism product. And, significantly, rather than the image of cheap beach holidays dragging Spain's image down (as might have been expected), the image of the 'new Spain' has enabled Spain to differentiate its beach product and sell a range of different beach holidays to different market segments – from affordable family holidays to exclusive spa retreats. The image of the 'new Spain' has not just opened up the interior and cultural Spain, but it has also endowed the whole of Spain with a credibility that previous perceptions of it as a one-dimensional beach destination would not allow.

- **Brand architecture in practice:** This credibility, based on the “new Spanish” brand values and reinforced through the current “Smile” device and the *el sol de Miró* logo, has enabled Spain’s regions to enter the international market in a way that might otherwise have been much more difficult. Regions, which previously might otherwise have struggled to achieve recognition in the international marketplace, such as Galicia, Andalucia and Cantabria, now boldly present their own identity in international marketing campaigns, while leveraging the values associated with the ‘new Spain’. This is perhaps one of the clearest examples of synergy between a national and sub-national brands whereby the regional brands leverage benefit from their association with the national brand, but are still able to breathe within it and convey their own distinctive identities as very different types of place.

Case study 8: Can a destination change its image? – South Africa

South Africa is perhaps one of the best examples of a country that has completely changed its image: from being something of an international pariah state under apartheid to a successful tourism destination that has attracted significant new markets, after the country’s transition to multi-racial democracy.

Few destinations ever face the same challenge or opportunity of political transformation as South Africa. But it is worth reflecting on the role played by the charismatic personality of Nelson Mandela, who came to symbolise the new South Africa. He was the face of South Africa, appearing widely at international conferences and sporting events to promote the new ‘rainbow nation’. He inspired confidence in the economy and in South Africa as a tourism destination. And the new flag quickly became not just an iconic symbol of the new, liberated South Africa, but one of the few most widely recognised national flags in the world.

The colours and shape of the South African flag were used in many different guises. These ranged from its reflection in beads in Tourism South Africa’s destination promotion, through different logos developed to promote wines of South Africa, the 2010 Football World Cup and the “Alive with Possibility” national stamp, to the tailplanes of South African Airways and the South African Broadcasting Corporation logo.

For a more detailed analysis see 1.3.3 *From ‘Destination to Place’: South Africa – ‘Alive with Possibility’*.



Conclusion – South Africa

- **Dramatic political change** provides an opportunity to change international perceptions of a country.
- But the opportunity for change must be **grasped wholeheartedly by all of the country’s main stakeholders**.

- The benefits associated with change will not come by themselves. A clear **strategy** must be developed to build on the new situation in which the country finds itself. The country also needs to communicate what has changed, what this means for residents, and how it affects potential visitors.
- **Internationally iconic personalities**, such as Nelson Mandela (and Barack Obama) come along only once every few generations. Their potential to reposition the country's image needs to be recognised at an early stage and judiciously applied in projecting the new image of the country.
- Never underestimate the **colours of the national flag** to inspire recognition of a country. If it works as an attractive design, its use should be considered across important nationally iconic and highly visible platforms, such as the national airline, sports teams, broadcasting network, business and tourism promotion agencies etc.

Case study 9: Can a destination change its image? – Colombia

Famous worldwide for cocaine, coffee and conflict, Colombia decided in the late 1990s/early 2000s that it had to change its world image.

Importantly it began with real substance. It underpinned its approach to change with some major investments in infrastructure and changes to the way it did business (in education, health, public infrastructure projects, safety and security, a new legal framework for businesses and a more favourable tax regime). This sent a signal to the world that Colombia was serious about doing business and changing the way the world saw it.

Tourism played an important part in this transformation too. Having introduced these major infrastructural changes, there was, inevitably, a lag between people's perceptions of Colombia's traumatic past and Colombia's new reality as a safe, welcoming, culturally rich country with the second greatest biodiversity in the world.

Part of Colombia's strategy included developing domestic tourism (promoted through the campaign *Vive Colombia. Viaje por ella* (*Live Colombia. Travel all around it*). This was backed by a "Rutas seguras" (*safe routes*) programme featuring 2,234 "Vive Colombia Safe Routes" for tourism. This gave Colombians confidence to travel internally. The increased level of security led to foreign governments downgrading their security advisories in Colombia's favour in its main tourism-generating markets, thereby helping to demonstrate to visitors that travel to Colombia was now safe.

Colombia also introduced a National Climate Change Policy (CONPES) in partial recognition of the importance of its biodiversity for visitors. Investment was made in tourism infrastructure projects; and visa requirements were eased or eliminated for several countries.

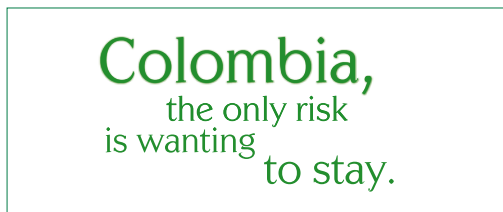
With real changes in infrastructure and security in place, Colombia embarked on a communications campaign.

A nation brand identity (i.e. covering public diplomacy, business, culture and tourism, but with an emphasis on public diplomacy and business) was developed: *Colombia es pasión*. This appeared to combine the warm heart of Colombians with the steam rising from a cup of Colombian coffee (one of its most important sources of export earnings along with tourism). More importantly, it was a strong clear, simple visual with a direct and catchy slogan.



However, interestingly, the approach to developing tourism was even more direct and, for some people, quite controversial. Colombia decided that, in order to attract visitors, it could not hide from its past traumatic history. This was too widely known to sweep under the carpet. And any pretence at ignoring it was likely to be treated with suspicion. Colombia acknowledged that the greatest factor preventing people from visiting Colombia was fear for their personal safety. Colombia therefore decided to tackle this perception head-on (which was in effect now a misperception, as much had been done through government programmes, such as the “Rutas seguras” campaign and others, to address and reduce the security problems).

In a courageous attempt to turn a negative into a positive and overcome this damaging lag between people’s perceptions of a past Colombia and the new, reformed Colombia, Colombia decided to challenge people’s perception of risk. It turned the notion of risk on its head and challenged people to consider the true risk in a positive and mildly humorous way, under the campaign slogan, in the form of a logo, “Colombia, el riesgo es que te quieras quedar” (“Colombia, the only risk is wanting to stay”).



This was a brave move. But clearly, it could only have achieved credibility and worked if it represented the truth: that Colombia really was much safer and that it was a sufficiently attractive tourism destination.

So, did it work?

Results, which combine both the overall national image for business and public diplomacy with tourism, suggest that it was extremely successful:⁶

- Visitors doubled from 624,990 in 2003 to 22,012 in 2008;
- GDP grew by 332% (2002-2007);
- exports rose 150% (2002-2007);
- unemployment dropped 29% (2002-2007);
- road mobility increased by 41% (2002-2007);
- hotel occupancy rose by 32% (2002-2007);
- the confidence index of the Colombian population increased by 75% (2002-2007);
- foreign direct investment rose to 5% of GDP in 2007 (US\$ 8.65 billion);
- Colombia climbed from 66th in 2007 to 53rd in 2008 in the “Doing Business” Index of 181 countries;

6 World Tourism Organization (2009), *Colombia – Back on the Map of World Tourism*, UNWTO, Madrid.

- Colombia was awarded the World Bank prize in 2007;
- Colombia's target is to raise income per capita from US\$ 3,000 to US\$ 18,000 by 2032.

Tourism's role in changing Colombia's fortunes has been widely recognised:

"The contribution of tourism to the success of this national branding program is a model example of the important role played by tourism not only in social and economic development, but also in forging the image of a country."⁷

Colombia is now firmly back on the world stage as country with which people can safely do business again and as a vibrant tourism destination.

<http://www.colombia.travel/en/>

Conclusion – Colombia

- Begin any change programme by putting important **infrastructure changes** in place. This provides evidence to the world that real change is taking place and that this is not just another communications campaign to paper over the cracks. It also sends a message that you are serious about making change.
- Understand **what matters most to your potential customers**, whether these are inward investors, businesses or tourists. Address these factors and make it clear to them that you have addressed them (e.g. safety and security for tourists and business visitors was a major concern in Colombia).
- Where your destination's reputation is dominated by a negative image, **do not be afraid to tackle negative perceptions directly**, as long as you really are doing something to address the problems and have made progress. (e.g. Colombia acknowledged the perceptions of risk people associated with a visit to Colombia and addressed these in a straightforward, but also slightly humorous, way. The concept of 'risk' was turned on its head to introduce a positive angle to Colombia: "The only risk is wanting to stay". Very importantly, this was backed by credible evidence that the authorities had addressed the risks that concerned people through the various projects they undertook to reduce the threat to visitors in Colombia).
- Being **honest and transparent in your communications** will ensure credibility into the future.
- **When the media spotlight shines on your destination for negative reasons**, this sometimes presents you with a good opportunity to challenge prejudices. By using such an opportunity to demonstrate the current truth about your destination, you can hopefully, begin to change people's minds in your favour.
- Similarly, there's **no time like a crisis for uniting stakeholders** behind the transformation of a country's image, as long as they can see demonstrable evidence of an intention to change by government.
- **Considerable value can be leveraged for a country, both as a place to do business and to visit, if it can harmonise these messages.**

N.B. 'Harmonise' does not mean 'standardise': both sectors must be able to breathe independently of each other and appeal to their own specific markets; but they should send similar messages at the level of brand values about the impact of recent changes.

7 Ibid.

Case study 10: Can a destination change its image? – Australia

Australia transformed its image dramatically in the 1980s from a country that had been perceived more as somewhere to emigrate than to visit. It became one of America's top ten most desired holiday-destinations, having never before made the top 50. While much had changed in terms of the product, particularly a strengthening of the contemporary cultural product and cuisine, success was largely attributed to the larger-than-life stereotypical Aussie comedian Paul Hogan, whose exhortation to "put another shrimp on the Barbie" in the Australian Tourism Commission's *Come and Say G'Day* campaign oozed Australian values of engaging informality, openness, friendliness and a straightforward, no-nonsense approach to life. Australian visitor numbers then doubled in the next four years.

While these same values are still part of the Australian brand, they are perhaps less relevant than others to certain market segments today. This does not mean that visitors no longer find Australians' engaging informality, openness, friendliness and a straightforward, no-nonsense approach to life attractive, but that their priorities have changed: they are more concerned to escape the frenetic pace of their everyday life, recharge their emotional batteries and reconnect with their partner when on holiday. Australia needed to appeal to this motivation and demonstrate that it could satisfy it.

Tourism Australia's 2008 *Walkabout* campaign recognised this change in travel motivation by projecting Australia as a place for transformation, an antidote for stress, a place where immersion in the country refreshes the soul and recharges the batteries. This was not a rejection of Australia's straightforward, open, friendly brand values; it merely focused on others – the tranquillity, solitude and soul-refreshing qualities associated with a majestic, wild, sparsely populated, natural environment. This is a clear example of a destination selecting different core values to convey in its marketing communications in order to suit the contemporary mood as tastes and travel motivation change in its key markets.



See <http://www.australia.com/campaigns/walkabout/int/index.htm>

Conclusion – Australia

- Once a destination has broken through the image barrier and attracted positive attention, it should continually **monitor consumer tastes in key markets and adjust the way it communicates its brand values** accordingly.
- As long as their underlying motivation for travel has not dramatically changed to the extent that the destination can no longer satisfy them, **changing consumer tastes usually require destinations to change their marketing message, context and tone**, rather than to rebrand the destination.
- More significantly, this illustrates the **way in which different brand values can be used selectively or dialled up or down** to target people in a particular segment and their motivation

for travel. (e.g. In the *Walkabout* campaign it is the openness and solitude inherent in the majestic and wild natural environment that are dialled up; the values of friendliness and straightforwardness of the *Come and Say G'Day* campaign are not relevant at this level for this segment, as they do not talk to their primary motivation for travelling as an opportunity to recharge their emotional batteries and reconnect with each other).

Case study 11: Can a destination change its image? – Glasgow

The former head of Glasgow's tourism promotion office⁸ used to remark, only partly in jest, that in the 1970s any tourist in Glasgow was someone who was lost en route to somewhere else, not a real visitor who had deliberately chosen to be there. This was largely because Glasgow's reputation in the United Kingdom and overseas had declined from being the vibrant 'second city of the British Empire' in the nineteenth century, to that of an economically depressed, run-down, violent city in the last throes of industrial decline in the 1970s and early 1980s. But in 2006 Glasgow was voted by readers of Condé Nast Traveller their "Favourite United Kingdom City"⁹, and in 2007 it was the fourth most popular city in the United Kingdom for overseas visitors¹⁰, with a total of 2.8 million United Kingdom and overseas visitors, who generated £ 700 million for the city's economy and sustained 31,000 jobs in tourism¹¹.

So what changed?

- Firstly this took time. In 1983 a visionary Lord Provost¹² (a role similar to that of city mayor in the United States of America), inspired by the 1977 *I Love New York* campaign, embarked on a campaign to promote Glasgow in order to attract inward investment and bring jobs to the city. This was a courageous and pioneering move at a time when city marketing was not yet widely perceived to be either an appropriate or effective use of public funds: "Many councillors objected to spending money on 'advertising' when so many roofs needed repair."¹³
- Secondly, the city authorities were reluctant to invest in this campaign until funding had been secured from the private sector.
- Thirdly, an inspired campaign was run in the United Kingdom, with memorable posters on London buses and taxis, using *Mr. Happy* from the popular *Mr. Men* cartoon figures along with the slogan "Glasgow's Miles Better" (a 'miles'...'smiles' pun was suggested through the smiley face of Mr. Happy and the juxtaposition of the words "Glasgow's miles better"). Mr Happy became an honorary Glaswegian (citizen of Glasgow). As well as boldly promoting the changes Glasgow was going through, the cartoon figure of Mr. Happy reflected one of Glasgow's core brand values of down-to-earth, engaging humour. This caught the public imagination and created widespread awareness of the fact that Glasgow was changing.
- Fourthly, a significant but unintended consequence of this campaign and some of the developments that followed (see below) was the sense of pride that it generated amongst the city's residents: "... an equally important, unpredicted side effect was the impact that the campaign had on Glaswegians themselves. The slogan gave them the opportunity to articulate the pride they felt in their city. By adopting it wholeheartedly they not only helped the campaign succeed, but created the necessary buzz and can-do attitude that were essential ingredients for the city's revival."¹⁴

8 Formerly the Greater Glasgow and Clyde Valley Tourist Board.

9 Condé Nast Traveller – Readers' Travel Awards 2006.

10 United Kingdom International Passenger Survey 2007.

11 www.seeglasgow.com.

12 (Sir) Michael Kelly.

13 <http://www.theglasgowstory.com/story.php?id=TGSFC05>.

14 Ibid.

But this was not enough to get Glasgow to where it is today. It had to be underpinned by real and obvious change. As part of Glasgow's regeneration programme, the city council focused on two areas that both accelerated a change in people's perceptions of the city and endowed the marketing campaign with credibility: a focus on culture and a commitment to attracting major events to Glasgow.

In 1988 Glasgow hosted the United Kingdom's third Garden Festival. The Glasgow Garden Festival was considered by many to be a turning point for the city, both because it had been awarded this accolade, but also because it demonstrated Glasgow's ability to attract visitors and play a serious role as a tourism destination. But what sealed this reputation and provided a major boost to Glasgow's self confidence and civic pride was its award as European City of Culture in 1990.

Glasgow followed this up by developing a strong cultural product – museums and galleries, festivals and events, art and architecture, music and comedy – which reinforced and built on its reputation as a cultural city. Glasgow also focused on sport as an important element of the city's character. The city pursued a vigorous policy of bidding for high profile events and awards, being designated European City of Architecture in 1999, UNESCO City of Music in 2008 and, in 2008, winning the competition to host the 2014 Commonwealth Games. And in 2009 Glasgow's image as a vibrant, culturally 'edgy', 'happening' place was further reinforced when it was awarded the opportunity to host the United Kingdom MOBO (Music of Black Origin) awards ceremony – the first time in MOBO's 14-year history that it had moved outside London.

An important factor in Glasgow's success was that it did not stand still. It built on the advances made in the 1980s and 1990s to embed awareness of the city as a cultural, 'cool', vibrant, cosmopolitan European city that does things differently. It would not have been credible for Glasgow to present itself in this way in the 21st century if the radical changes and investment in regeneration that followed the *Mr. Happy/Glasgow's Miles Better* campaign in the 1980s and 1990s had not happened. By the beginning of the 21st century Glasgow now had the product, the confidence and the credibility to promote itself as a European city on the same basis as long-established tourism destinations such as Edinburgh and London, without having to tell people that it was changing. It had changed and there was considerable awareness amongst people in the United Kingdom and other countries about the new, dynamic, cultural Glasgow.

A new campaign was launched in 2004 that reflected the distance Glasgow had travelled in terms of both the sophistication of its tourism product and public consciousness about the city. Glasgow's new proposition was a 'full-on European city experience', which was expressed in the slogan "Glasgow: Scotland with Style". Targeting 'style setters', this cleverly linked the city to the national (Scottish) brand, thereby leveraging the positive values associated with Scotland; but, importantly, it ensured that Glasgow had its own distinctive personality which could also add value to the Scotland brand.

The "Glasgow: Scotland with Style" campaign took its inspiration from one of Glasgow's most famous cultural figures, Charles Rennie Mackintosh, and the Glasgow style movement of the early 1900s. It also built on the city's reputation for producing famous musicians (including Sharlene Spiteri of Texas and bands such as Franz Ferdinand and Glasvegas), as the United Kingdom's best preserved Victorian city and as one of Britain's largest retail centres outside London, with a wide range of specialist as well as major 'High Street' shops. An important element of the Glasgow experience was "the emotional characteristics of its citizens with their own distinctive self-deprecating humour, genuine friendliness, a cosmopolitan attitude and a firm belief in fair play".¹⁵ The city defined its brand personality as 'cosmopolitan', 'humorous', 'generous', 'outgoing', 'genuine', 'creative' and 'embracing'.

The results spoke for themselves again. Between the launch of Glasgow's new brand positioning in 2004 and 2007/2008:¹⁶

- Annual hotel occupancy rose from 68.8% to 77.1%.
- Glasgow experienced a £ 62 million increase in tourism expenditure.

15 Glasgow City Marketing Bureau, *Glasgow: Scotland with Style – The City Brand*

16 Ibid.

- Convention bookings increased to £ 151 million.
- A 2% shift was identified in intentions to visit Glasgow in the three months following the survey amongst the city's target audience. This represented 1.1 million bednights and an expenditure of £ 129 million.
- The "Glasgow: Scotland with Style" campaign won various awards.
- Glasgow's character as a stylish city was endorsed by commentators from Vogue and Condé Nast Traveller to the Lonely Planet, which described Glasgow as "...regenerating and evolving at a dizzying pace. It is edgy, modish and downright ballsy."¹⁷

Conclusion – Glasgow

- **Changing perceptions takes time and commitment:** Glasgow began the process of change in 1983. But the turning point came in 1988 with the city's hosting of the Glasgow Garden Festival, followed by the City of Culture award for 1990. It was not until 2004 that Glasgow launched the "Glasgow: Scotland with Style" campaign, demonstrating a radical change in both people's attitudes towards Glasgow and in the city's self confidence over 21 years.
- **Inspirational and determined leadership is essential:** Glasgow's Lord Provost led a campaign against considerable odds to reposition Glasgow over several years, starting in 1983.
- **Private sector support can be critical:** Glasgow City Council was reluctant to fund the campaign until private sector funding was secured.
- **Target events that reinforce the destination's brand image:** Glasgow focused on attracting cultural and sporting events to the city, enhancing the city's reputation as a cultural, dynamic and vibrant place with each bid won.
- **Choose the right time to refresh a brand:** The "Glasgow's Miles Better" campaign projected a city that had changed from a less illustrious past. But people will only buy the idea that things have changed for so long. They then need to be told what's new and what the city now stands for. Glasgow had to judge when the new Glasgow had penetrated people's consciousness sufficiently for it to be credible to promote Glasgow as a "full-on European city experience" under the "Glasgow: Scotland with Style" banner. If this had been embarked on too soon, it would not have been credible and Glasgow would have failed to reposition itself amongst its target audience of style setters; and, if the message about change had continued too long without the kind of inspirational substantiation conveyed in the "full-on European city experience" proposition, then people would have grown tired of hearing the same message about change and might have lost interest in the new Glasgow. Timing was critical.

<http://seeglasgow.com/media-office/news-archive/january-june2008/new-lonely-planet-guide>



¹⁷ Ibid.

Case study 12: The power of events to influence brand image – Germany

Germany has an enviable reputation globally for engineering and technical competence – so much so that Audi do not even translate their company slogan “*Vorsprung durch Technik*” (progress through technology), in their British advertising. Keeping the German phrase, which has become a well-worn catchphrase in the United Kingdom, retains a positive association with German technical expertise. This is a distinct competitive advantage for German manufacturing and engineering products. But technical expertise has not necessarily translated into tourism appeal. Germany was for many years seen as a rather unexciting, formal and unwelcoming destination in certain European countries. This is in contrast to its image as a historically fascinating country in the US market.

In spite of the rebirth of Berlin after the collapse of the Berlin wall and German reunification in 1990, and Berlin’s widespread recognition as one of Europe’s most vibrant cities, Germany’s image still remained largely unexciting. But a major change to this image was to come from a most unexpected direction.

As host of the Football World Cup in 2006, Germany decided to welcome fans without tickets to the games. Previously, host countries had urged football fans to stay away if they had no tickets, in order to avoid congestion and possible violence. Germany took the surprise decision to be the first country ever to welcome as many people as wanted to come. Germany positively invited fans without tickets to travel, mounted large video screens in city centres for them to watch the games and encouraged a party atmosphere. This strategy may have been partly driven by the need to address the threat of public disorder by accommodating people who were going to come anyway. Whatever the reasons, people came in their droves and had a great time, with very few incidents.¹⁸

“Around 21 million people visited the official FIFA Fan Fests in the twelve host cities, exceeding all expectations of how many the public screenings and “Fan Miles” would attract. By the middle of the tournament, some cities had to expand the areas they had set aside. Nine million people came to Berlin alone, the first time an event in Germany recorded more visitors than the Oktoberfest, the largest public festival in the world.”^a

a) German National Tourist Board (GNTB), ‘The 2006 FIFA World Cup and its Effect on the Image and Economy of Germany’.

But more importantly they met Germans of their own age and partied with them. Overnight the image of Germany changed to become much more positive as a welcoming friendly destination – and not just amongst those who travelled to Germany during the World Cup or amongst one particular age group. Positive media coverage ensured that Germany’s image was transformed much more widely throughout Europe: 95% of people surveyed during the World Cup found the majority of German people to be friendly and 88% of visitors to Germany would either probably or definitely recommend the country as a travel destination.¹⁹

The value of World Cup-induced activity to Germany’s economy was estimated at approximately three billion Euros, spread over a period of three years. It was “predicted to create 50,000 new jobs, which were expected to generate additional economic value of about 1.5 billion Euros in 2007 and 2008, and to increase tax receipts by around 600 million Euros”.²⁰

But perhaps even more rewarding was the finding that “Germany’s image improved significantly in Italy and Brazil, and, more unexpectedly, in France and the Netherlands”.²¹

Germany had begun to change its image in important European markets by displaying the human face behind its technical expertise.

18 German National Tourist Board (2006), ‘The 2006 FIFA World Cup and its Effect on the Image and Economy of Germany’, in: *Survey into the FIFA World Cup Host Cities*.

19 Ibid.

20 German National Tourist Board (2006), ‘The 2006 FIFA World Cup and Its Effect on the Image and Economy of Germany’, in: *Seventh Progress Report by the German Federal Government in Preparation for the 2006 FIFA World Cup*.

21 Ibid.

Quite simply, mass exposure to 'real' Germans through the brave and innovative decision to encourage people to come to Germany during the World Cup, regardless of whether they had tickets or not, not only transformed perceptions about Germany amongst the vast numbers of people who travelled to Germany, but it also presented a new impression of Germany to many millions more who watched the World Cup on television around the world.

Conclusion – Germany

- **Simple actions can mean a lot:** Inviting people to come, regardless of whether they had tickets, meant people of many different nationalities mixed with, and experienced, 'real' Germans. This was enough to change perceptions about Germany as a friendly place amongst football fans who travelled to Germany and many more around the world who observed the party atmosphere on television.
- **Different aims can sometimes be served by the same solution:** Organising large screens and 'fan fests' for people without tickets to watch games in cities throughout Germany may have initially been a tactic to deal with the potential security problem posed by hordes of fans without tickets. But, in the end, it achieved three things:
 - It resolved security problems;
 - it generated considerably greater economic benefit than might otherwise have been the case;
 - it contributed significantly to a change in Germany's image as a place to visit.

Case study 13: Technology versus tourism – Positive or negative? – Japan

Like Germany, Japan's international image is largely driven by its reputation for technical expertise, primarily in electronic products. So much so that Dixons, the United Kingdom high street electrical goods retailer, developed a Japanese-sounding brand name, *Matsui*, for its own products. But modern electronics and centuries of cultural tradition at first appear mutually contradictory, thus posing a considerable challenge for developing a Japanese national brand.

However the common thread is a commitment to quality and attention to detail. This is as important for purchasers of the latest plasma screen TVs as it is for visitors seeking high standards of hospitality and customer service in a *ryokan* (Japanese guesthouse).

Conclusion – Japan

This is a clear demonstration of how a perceived **brand values** (*caring, attention to detail, pride in product and service quality*) **can transcend different sectors** and be equally important for export manufacturers and tourism businesses to express to their prospective customers.

Case study 14: Similar but different – Breaking away from the chains of a regional image – Estonia, Latvia and Lithuania

The Baltic countries (Estonia, Latvia and Lithuania) are perhaps more famous for their capital cities (Tallinn, Riga and Vilnius) than their countryside. The well-preserved architecture of their old towns has driven city-break tourism, but with few visitors venturing into the countryside beyond. For most people these countries **are** their capital cities. And their landscapes are quite similar – relatively flat, forested or marshland. Even within one of their largest markets, Russia, they are largely perceived as

one, having been an attractive summer seaside retreat and desirable military posting – the former Soviet Baltic republics.

So can they achieve any differentiation from each other? And does this matter if they are regularly sold together as part of a Baltic capitals tour? For the sake of developing future and repeat business it probably does matter. However, at the moment the seeds of differentiation are emerging:

- **Estonia** profiles itself as a dynamic, young economy. It is the birthplace of Skype telephony (even though the founders were Swedish and Danish and its head office is now in Luxembourg).
- **Latvia** presents itself as “The Land that Sings” – a reference both to its cultural traditions and to its part in the singing revolution, which, in 1989, saw a human chain of about two million people holding hands from Tallinn in Estonia through Latvia to Vilnius in Lithuania, singing previously banned songs and demanding independence from the Soviet Union.



- **Lithuania**, which the Lonely Planet guidebook describes as “rebellious, quirky and vibrant”²² promotes itself as ‘brave’, reflecting its challenge to Moscow in 1989 which saw it lead the charge for the independence of the Baltic States. Whether ‘rebellious and brave’ remain core Lithuanian brand values, in the way that they have underpinned definitions of Scottishness for some people over the centuries, or whether they perish as Lithuania takes its place as just another modern European economy whose history no longer defines its current character, remains to be seen.

Conclusion – Estonia, Latvia, Lithuania

- Although they have not yet fully developed their branding strategies, this is an interesting illustration of how three fairly similar countries have begun to look at their assets in an attempt to distinguish themselves from each other.
- It will also be interesting to see how Estonia’s reputation for developing Skype, gels with the promotion of medieval Tallinn as a tourism destination. Like Japan’s *caring* value, which transcends both manufacturing and tourism, the common thread between tourism and technology will probably lie somewhere around the value of *dynamism*.

Case study 15: Internal branding – Convincing your own people – Namibia

In the early years of the 21st century, Namibia was a little known country outside South Africa and its former colonial ‘godmother’, Germany. Even a traditional bushman observation – “when God made this country, he must have been angry” – would hardly inspire people to consider visiting on holiday.

So the Namibia Tourism Board embarked on a brand development campaign to position the country as a tourism destination more widely in Europe and South Africa.

Qualitative research was undertaken in South Africa, Germany and the United Kingdom to establish Namibia’s core appeals. This was then discussed with Namibian stakeholders in tourism, manufacturing and international diplomacy. Fortunately both visitors and Namibians viewed the country in largely the same way.

22 Lonely Planet guidebook to Estonia, Latvia and Lithuania

But the most revealing insight, which reinforced the reason for in-depth customer research in developing a brand, was the difference between previous visitors and non-visitors. Both were interested in experiencing African nature and culture. Namibia offered a wonderful wildlife experience. But, when non-visitors expressed an interest in experiencing tribal culture, previous visitors explained that this was difficult without being intrusive. They did, however, emphasise that Namibia's strengths lay in its vast, majestic scenery and awe-inspiring sense of freedom that such vast wilderness and scenic beauty inspired and, unusually for Africa, in the opportunity for self-drive, which opened up the country to visitors.

Consequently the Namibia Tourism Board's marketing changed. It downplayed the cultural experience angle and emphasised the vast landscapes and sense of freedom and escape they engendered, by applying the following brand values in their marketing communications: 'rugged' and 'natural' to describe the place; 'soulful' and 'liberating' to describe the relationship between the country and its visitors. This was a powerful, almost elemental, relationship, expressed by focus group participants in terms such as "the openness, silence, vastness, distances, stars – it all makes you feel fulfilled" and "it's as if God has finished and you're the first person there".

This led to the brand insight and core proposition "*Namibia is an experience, not a place*". This in turn was communicated to stakeholders through a brand toolkit. Its simple aim was to help everyone look more Namibian. Those who marketed Namibia, and particularly tourism operators, were encouraged to use a particular tone of voice, pictures and colours that reflected Namibia's brand values.



Three years later (2007) Namibia experienced a worldwide growth in visits of +11%. But, perhaps more significantly, it received +17% growth from Europe, which dramatically outperformed the 2.3% growth rate of its high performing neighbour, South Africa.

Conclusion – Namibia

- **Qualitative consumer research** is the best way to establish what people think of a destination.
- **Evidence from consumer research** is the most effective tool for changing stakeholders' perceptions of their own country's appeals.
- It is important to interview both **previous visitors and non-visitors** when undertaking research into consumer perceptions of a destination.
- NTOs must have the **courage to change their marketing** on the basis of consumer research findings.

Case study 16: Place-branding: Uniting partners to compete on an international stage – Lyon

The idea of a place brand for Lyon came from two reviews carried out during 2004, highlighting the following areas of concern:

- a lack of renown and awareness of Lyon as a major city, mainly among international investors.
- low appreciation internationally of the key sectors and main assets of the City of Lyon due to a proliferation of stakeholders and inappropriate communication.

A benchmarking study was commissioned in 2006 by Lyon's main economic partners in order to identify the city's position among European major cities. This confirmed Lyon's varied assets as:

- quality of life;
- a critical size;
- good access to market;
- a qualified and extensive labour force;
- affordable real estate.

But the study also underlined the vagueness of the global economic image of Lyon.

The decision was taken to launch a destination logo to promote Lyon's economic assets. The "ONLYLYON" logo was created in January 2007. More than an anagrammatic word pairing, this logo acted as a rallying point for stakeholders in that it symbolised Lyon's ambitions, as well as the brand philosophy and objectives. The targets were to increase the number of investors, companies, and economic stakeholders.

From January 2007, a strategic plan guided activity centred on the four 'pillars' of communication and marketing, press work, events and an ambassadors' network. A dedicated team set up in February 2008 was responsible for developing these activities. The brand was widely adopted by local and international stakeholders.

Even though the brand was initially aimed at communicating Lyon's image abroad and was targeted at business stakeholders, it was soon discovered that this needed to be amended. Since the brand was found to need local buy-in in order to develop its image and scope internationally, the branding therefore also had to be promoted locally.

Work was needed to establish Lyon's brand values. Lyon wanted to emphasise its culture, 'savoir-vivre' and not merely its business assets and started to address individuals as well as businesses. These were primarily values that applied to tourists, but it became apparent that they were equally important as appeals for attracting businesses to Lyon.

The brand is considered by stakeholders to be successful and well-liked, and other cities have copied the initiative and process.

The brand is perceived to be a tool that allows Lyon's different stakeholders to work together on new and innovative activities to promote the city. Lyon has a reputation for its cohesion among stakeholders and stakeholders feel that the brand now permits them to collaborate on an international level.



Conclusion – Lyon

- Sometimes the symbol of the brand, in the form of a logo, can be significant in **uniting partners**, particularly across different sectors, behind a place brand.
- **Brand values** that at first glance would seem to be more relevant to visitors (e.g. culture, 'savoir-vivre', quality of life) can be equally appealing to businesses, as long as the 'rational' factors that businesses require (e.g. critical size, good access to market, a qualified and extensive labour force, affordable real estate etc.) are in place. They can often make the difference between people's perception of a place as merely offering adequate business opportunities and it being perceived as a great place to do business as well as visit.
- Understanding how brand values transcend different sectors can enable **synergy between different sectors** in branding a place for tourism and inward investment.
- A **dedicated team** is required to drive the branding of a place.
- **Internal marketing to local stakeholders** is important to enable the brand to grow roots in the destination. This will be critical to its impact, as the more stakeholders support it, the more impact it will have.
- **Brand ambassadors** can help secure buy-in from local stakeholders.

Conclusions and Recommendations

7.1 Introduction

This section highlights some of the most important issues to be remembered when branding a destination. These are presented in the form of **practical recommendations for practitioners in NTOs**. It is particularly aimed at the brand manager/guardian, or whoever is charged with this function whatever it may be called, within the NTO.

Even if the NTO has no officially appointed brand manager, it is important to recognise that these functions are critical to the destination's success. They should be the starting point that underpins the NTO's strategic approach to marketing the destination. If the NTO embarks on marketing the destination without first establishing its brand, then it is unlikely to be successful, and possibly doomed to failure.

7.2 At the Beginning: Understanding the Brand and Its Role

- Make sure you **understand what a destination brand is** and that you can communicate this clearly to stakeholders (i.e. The essence (DNA) of the destination, not a logo or a product).
- Understand that **you will be establishing a brand for the long-term**. This is not to say that it can not change. Of course it can – and must as time progresses. But the brand underpins the NTOs' marketing over the long-term. It does not change with marketing campaigns. However, marketing campaigns may change to communicate the brand more effectively.
- A brand cannot be created by clever marketing communication. **It must be based on real substance** – what visitors can experience in the destination and the way it will make them feel. Marketing communication merely brings the brand to the attention of potential visitors; it doesn't manipulate their perceptions: it presents a credible and deliverable image of the destination based on fact.
- **Branding is for everyone**. A small budget is not an excuse for failing to establish a clear brand for your destination. This is because the brand should guide, and the brand essence should ooze from, every act of communication between the destination and visitors, whether face-to-face or in marketing communications. Imagining that it is not possible to brand a destination on a small budget is as ridiculous as suggesting that only rich people can afford personalities. It is that simple ...and that powerful.
- Understand that the brand represents a **dynamic relationship between the core assets of your destination and the way in which people perceive them**. Ultimately the brand exists in the eye of the beholder. It depends on visitors experiencing the destination in a way that reinforces the brand values, as well as on the way in which you and your destination stakeholders project the brand in marketing communications.
- Recognise the **importance of your stakeholders** – not just those in the tourism industry (e.g. include government, business, arts, sporting and cultural organizations and residents' groups). Identify those with whom you will need to work, and the way in which you will involve and communicate with them as you begin to develop the brand with them.

7.3 Developing the Brand – Main Steps

1. **Identify your main segments in core markets.** These will drive the development of your brand. Even though, ultimately, your brand represents the enduring essence of your destination across all segments, it is important to identify the way in which your destination makes your core segments feel. When marketing to different segments, you can then dial up or down different brand values for different segments. This is about establishing a set of core brand values, which represent the essence of your destination, and then emphasising those that resonate most with each different segment in your marketing to those segments.
2. **Involve your destination's key stakeholders from the outset,** so that they will buy into the brand that you are developing on their behalf, which represents their home country (or region or city). Treat them as active participants in the development of the brand, not as objective bystanders.

This means identifying a **core group** of leaders from different sectors in business, arts, culture, media, sports and the community, who will actively help you develop the brand. Establish a regular means of involving and communicating with them. Some of these people might be on the Brand Steering Group.

Establish a way of communicating with a **wider group** of stakeholders (e.g. businesses, residents and other organizations), so that you can both involve them in obtaining their feedback at critical stages of the brand development process (e.g. via the media, public workshops, etc.) as well as communicate new developments to them whenever necessary.

3. Undertake a **destination audit through consultation with stakeholders,** to establish how they perceive the destination. (N.B. This should not supersede visitor perspectives of the destination, as your potential visitors are your most important focus. They are your potential customers, so you need to ensure that you address any misperceptions they might have and develop your brand so that it appeals to them; otherwise they will not come.)

Sometimes, no matter how much they are confronted with potential visitors' perceptions, **residents may not agree with the way in which the destination needs to present itself to visitors** in order to attract them. (E.g. where potential visitors admire the destination's heritage, but residents are only interested in the destination's future and in presenting a modern image.) This can be a major problem, as it can lead to a disconnect between the destination's marketing and the way in which visitors experience the destination through residents' behaviour when they arrive. More likely, though, is that a failure to work together to present a coherent brand by the NTO and other stakeholders will result in less marketing impact on potential visitors.

The best way to avoid this disconnect is to work with stakeholders from the outset, ensuring that they understand both the role of a destination brand and the importance of using the destination's strongest assets to appeal to potential visitors.

4. Undertake **qualitative consumer research** to establish what people in your core segments, and potential segments, think of your destination. This is the most effective way to really understand their underlying motivation for travel and how your destination matches – or fails to deliver – against these motivations.

You must dig deep to establish this motivation; otherwise your research will be useless. Do not settle for a mere list of 'likes' and 'dislikes'. This means selecting a research agency with care. You must satisfy yourself that they both understand the need to dig this deep and have sufficient experience to do it. Otherwise you may end up with a quantitative analysis of which things visitors liked best, and which they liked least, about your destination, which will not move you forward in developing your brand.

Qualitative consumer research should be undertaken amongst both **previous visitors and non-visitors** in your key target segments. Their views can be very different and highly enlightening.

Qualitative consumer research should aim to **answer the following questions on behalf of potential visitors:**

- What are the main things I like about the destination?
 - What sort of place is it?
 - How does it make me feel?
 - How would I describe it in one sentence?
 - What makes it different from all other destinations?
5. Undertake a **SWOT analysis** and a **competitor analysis** for each main segment and then use these to inform the development of your brand personality, brand essence, values and positioning statement. Make sure that these are not just an undifferentiated list of strengths, weaknesses, etc.; they should be relevant strengths, weaknesses, opportunities and threats that have a real, or significant potential, impact on your destination's competitiveness; and they should be prioritised where possible.
 6. Choose a **brand-building model** to help you build up the brand (e.g. from rational attributes, through emotional benefits to brand personality, positioning statement to brand essence and values). There are many different models and it does not matter which one you choose as long as it works. Choose whichever model you find easiest to use and are most comfortable with.
 7. Establish a **steering group** to support you in developing the brand, and later in maintaining and driving it forward. Ideally this should consist of no more than 6 to 8 people, with a senior representative from the NTO marketing team (who will have to implement the brand), influential representatives from the inbound industry, government/tourism ministry and other relevant organizations. A senior representative from business with branding/marketing expertise from beyond the travel industry can also be useful, if such a person exists who can command sufficient respect externally.

This should be chaired by the brand manager/guardian. It might be chaired in the beginning by the NTO Chief Executive, until it is established, in order to send a signal within the NTO and externally about the importance of the brand to the destination.

8. It is useful to appoint a **branding agency, or expert**, to help you develop the brand. This person (or agency) can provide independent advice, ideally based on considerable experience elsewhere, which can help you negotiate the potential pitfalls involved in developing a brand. They can add value by contributing to your own knowledge and often be useful in communicating a much-needed external, and therefore credible, perspective to stakeholders and politicians, which is not always the easiest thing for an NTO to achieve.

Before appointing a branding agency or expert, you should **identify what you want this expert to do**. In other words, it is most cost-effective to do what you can yourself and then recruit an external expert to fill the gaps that you cannot effectively fill yourself.

It is important too, to clarify with the expert that the outcome must be a practical result (e.g. a brand essence, set of brand values and positioning statement) and that you are able to understand how this can be incorporated in your future marketing communications. Unless you specify this, a branding agency may only deliver a theoretical brand (e.g. a set of values) without articulating how these should be applied, leaving the NTO with an impressive PowerPoint presentation but no idea how to implement the result.

7.4 Implementing the Brand

To be successful, the **brand must run through everything the destination does**. This means identifying the destination's essence and encouraging brand-compliant behaviour in all who meet, deal or communicate with visitors: from airport immigration on arrival through every contact with tourism providers and ordinary residents in the destination to departure.

It also means projecting the brand's essence in all marketing communications that emanate from the NTO and, ideally from destination stakeholders. For a small NTO this might just be in a couple of web pages or the way in which visiting journalists are exposed to the destination; or it could extend to a multi-million dollar TV advertising campaign, depending on the NTO's budget. It is important to dispel the myth that a brand can only be communicated through (expensive) advertising.

The important message is that, however the destination communicates with visitors, it should base its communications on its brand values, which must run through all these communications like blood in its veins. Without this character-giving blood coursing through its communications veins, the destination will appear as a mere collection of undifferentiated, characterless products.

Stakeholders include sub-national destination brands. In developing a **national brand architecture**, it is important that sub-national destination brands are able to breathe through having their own distinctive marketing identity. But they must also have a demonstrable link, at the level of some shared values with the national brand, which makes them all appear related and emanating from the same country.

Often the best opportunities for **sub-national brands** to reach their potential markets lies within national brand marketing materials, such as websites and brochures. This allows sub-national brands to take advantage of the market penetration and distribution achieved by the national brand. They can then present their own distinctive brands to a targeted audience at a point where they are likely to be most receptive, which they could otherwise not afford to do.

You cannot, and should not, change your brand overnight. Its value comes from the image and equity that it builds up in the eyes of previous and potential visitors.

If, however, your brand has grown tired, visitor tastes have changed or your destination no longer appeals to visitors, then it may be time to consider **refreshing the brand**. But first consider whether it is really the brand that has lost resonance with your visitor base, or whether it is the way you present the brand in your marketing that needs changed. Often it is the creative execution, rather than the brand itself that has lost impact and needs to be refreshed.

The brand manager/brand guardian should consider refreshing the brand, or even possibly rebranding the destination completely, when there is evidence from brand-monitoring studies that the brand has become '**comfortably familiar**'.

When refreshing or rebranding the destination, a **cost benefit analysis** (in consumer perception, not monetary, terms) should be undertaken to establish whether there might be any elements of the existing brand that are worth retaining. This will avoid losing any valuable equity associated with the existing brand.

7.5 Managing and Monitoring the Brand

The **brand steering group** should now oversee the further development, implementation and, where necessary, refreshing of the brand.

Brand champions and advocates should be appointed to help embed the brand throughout the nation (or region or city) and in their own sectors and organizations. They will be important in ensuring that the brand is seen as valuable and important and in its adoption by other stakeholders.

Brand champions perform a wider role, as respected ambassadors for the brand across several communities and organizations at a national (or regional, or city) level, whereas **brand advocates** are

people who occupy senior positions within an organization and are charged with ensuring that their organization adopts the brand (e.g. in its marketing communications).

A **brand toolkit** should be produced to explain to both NTO staff and stakeholders how to apply the brand in their own marketing communications. This should contain a motivational section explaining what the brand is (i.e. essence, values, etc.), how important it is, and how to apply the brand essence in marketing communications. It should also contain technical guidelines on how to use the brand identity (if this is available to stakeholders for use in their own marketing communications), along with any licensing issues.

The most important part is the explanation as to how the brand essence can be communicated in marketing communications. The more organizations that do this, the greater visibility, and therefore greater impact, the brand will have.

This should be published in electronic format on the NTO website, with a contact point for further information.

The brand's impact and its health (i.e. the esteem in which the destination is held by potential visitors) must be **monitored**. There are various methods for doing this. However, it is important to recognise that changes in people's perceptions of the destination are unlikely to be detectable immediately, unless a particularly damaging incident occurs. Brand-tracking should therefore be undertaken no more frequently than every 2 to 3 years, as more frequent brand tracking will be unlikely to yield useful results that could inform change.

An **internal marketing programme** should be developed for NTO staff and key stakeholders to enable them to understand and apply the brand. The toolkit is a useful resource for this.

Brand champions and brand advocates need to be trained, so that they understand what the brand is all about and how to articulate its value when they attempt to convince others to adopt it.

Residents also need to be sensitised and made aware of the role and value of the brand, so that they can understand, and ideally feel pride in, the way their country (or region or city) is being represented. This can be done through the media and, subject to budget, public discussion groups and presentations.

7.6 Critical Success Factors and the Future

Critical success factors in developing a successful brand are:

- A good understanding of the destination's **core market segments**.
- **Qualitative consumer research** to understand people's deep motivation for travel and their feelings and attitudes towards the destination, not just their likes and dislikes.
- A clear understanding of the destination's **competitive position**, its relative strengths and weaknesses.
- **Leadership** and support for the brand from the very top (e.g. NTO CEO and ideally from government as well – tourism minister, prime minister or president), that is both enthusiastic and highly visible.
- A robust brand management system that includes an energetic **brand manager/guardian**, influential **brand champions** and committed **brand advocates**.
- An **internal brand communications programme** that inspires commitment to the brand amongst NTO staff.
- Destination **stakeholders' buy-in** to the brand through their involvement in developing the brand from the outset.

- **Ongoing communication with stakeholders as involved participants**, not as external observers.
- **Adoption of the brand** by commercial and other destination stakeholders in their own marketing communications – thereby stretching the brand’s impact.
- Constant **monitoring of the brand’s impact** and relevance amongst key target segments.
- An understanding throughout the NTO that **everyone is responsible** for applying the brand in marketing communications and behaviour, not just the brand manager.
- **Long-term commitment** to enable sufficient brand equity to be built up for the brand to gain traction in the marketplace.
- A **mindset** within the NTO that positions the brand at the centre of all marketing communications.
- **Living the brand:** A brand is not just about marketing communications; behaviour is critical – by the NTO and its staff, by stakeholders, and by residents (i.e. everyone with whom the visitor comes into contact, whether face-to-face or as a recipient of information, service or products provided by anyone in the destination). Behaviour – as in the way that visitors experience a destination through the people they encounter – has always been the most important element of a destination brand. In the Web 2.0 environment, where people can ‘Twitter’ and exchange immediate views on both good and bad destination experiences, brand-compliant behaviour, or at least behaviour that reinforces rather than contradicts the core brand essence, will become even more critical.
- **Place branding will become increasingly important, and valuable.** Destinations will have to develop partnerships with other sectors to project an overall, holistic brand, as part of an overall national, regional or city effort. But they will still need to apply their own distinctive destination brand when talking directly to potential visitors.
- NTOs need to find ways of remaining relevant and useful to potential visitors in the **digital era**. The Web 2.0 environment requires a change of mindset in the ways NTOs approach their marketing communications. But the role of the brand – as a consistent representation of the destination’s brand essence – remains the same. It is, if anything, even more important, amongst the welter of ungraded information available online from limitless sources.
- Destination branding success requires a particular set of **skills and attitude in an NTO** – ideally in the brand manager/guardian. The brand manager/guardian needs to persistently seek opportunities to improve the destination’s competitiveness; be aware of competitors’ activity; clearly understand the role of a brand and the difference between branding and marketing; adopt an unwavering commitment to the branding project once it has begun; possess the skills to persuade stakeholders to get on board; understand the market environment; inspire staff and stakeholders; and ensure that the brand is projected in an impactful way through clever creative execution.

Current NTO Branding Practice (NTO Branding Survey)

1 Executive Summary

1.1 Purpose

This annex summarises current branding practice amongst ETC/UNWTO member NTOs, who responded to a questionnaire e-mailed in July and August 2008.

The questionnaire covered 3 distinct areas of questioning relating to respondents' current approach to destination branding:

- Perception of the nature of a destination brand;
- current branding practice of their destination;
- willingness to share best practice in destination branding.

The following sections outline the key findings.

1.2 Overview

Most respondents had a clear view on the role of destination branding and exhibited a very professional approach. Almost all have an official brand strategy, which they developed with stakeholders and/or sub-national destinations. Most have a toolkit explaining how to apply the brand. Reassuringly, a large number of stakeholders use the destination brand in their own marketing communications. Worryingly however, the average life of a destination brand appears to be around 5 years, which hardly allows time for the brand to take root amongst its key audiences. Countries are increasingly developing nation/place – rather than just destination – brands. New Zealand is widely admired for its approach to branding, followed by India, Spain and then Australia.

1.3 Definition of a Destination Brand

Most respondents defined a destination brand as:

- A set of values (18%);
- a competitive identity (17%);
- a destination essence (17%).

1.4 Branding Practice

- 82% of DMOs have an official brand strategy.
- 91% declared that they developed this strategy in collaboration with private and public sector stakeholders and regional tourist boards.
- 59% of destinations stated that they had been influenced by the need to represent/include various regional destinations and products when developing their national tourism brand.
- All respondents felt that it was very important or of the highest importance that stakeholders understood and supported the brand.
- Most DMOs believe that their stakeholders use the destination brand in their own marketing communications very often or most of the time.
- The median length of use of a current brand is just over 5 years.
- Just under 29% of respondents declare to have used their brand for 10 years or over; almost 12% of brands have been in use for less than a year or are being redesigned currently.
- 58% of brands are used for tourism promotion only, but there is an increasing tendency to consider developing a national brand that extends beyond the tourism sector.
- 37% of DMOs are involved in cooperative branding with other destinations.
- 80% of NTOs have established a set of brand values for their destination.
- 74.2% of DMOs declare to have developed unique positioning statements for their destinations.
- 62.8% do not employ a dedicated brand manager for their destination.
- 62.8% of respondents measure the impact of their brand.
- Over 79% of respondents have a brand toolkit, with a majority of kits featuring explanations of both technical elements as well as brand values.

1.5 Good Practice

Respondents were asked which destinations they considered to be good at destination branding. The destinations that gathered most 'votes' were:

1. New Zealand (10)
2. India (7)
3. Spain (7)
4. Australia (5)
5. Dubai (3)
6. Ireland (3)
7. Malaysia (3)

22 respondents shared branding experience in order to highlight aims and objectives and lessons learnt.

2 Methodology

Following consultation with the ETC Market Intelligence Group, the ETC Secretariat and the UNWTO's Market Trends, Competitiveness and Trade in Tourism Services section, it was decided that primary research would be carried out among all ETC and UNWTO Member NTOs.

Yellow Railroad, consultants to the project, designed an 8 page questionnaire, which was subsequently revised following 2 rounds of comments by members of the ETC Market Intelligence Group and the UNWTO. The ETC Market Intelligence Group brings together the Research Directors of the NTO members of ETC.

The questionnaire combines both closed and open questions as well as allowing respondents to rate some responses on relevant Likert scales. It comprises 3 distinct areas of questioning relating to the respondents' current approach to destination branding:

- perception of the nature of a destination brand;
- current branding practice of their destination;
- willingness to share best practice in destination branding.

The final version of the questionnaire was emailed to 165 NTOs on 2 July 2008 and a reminder was sent out on 19 August 2008.

43 filled in questionnaires were received, a response rate of 26.06%.

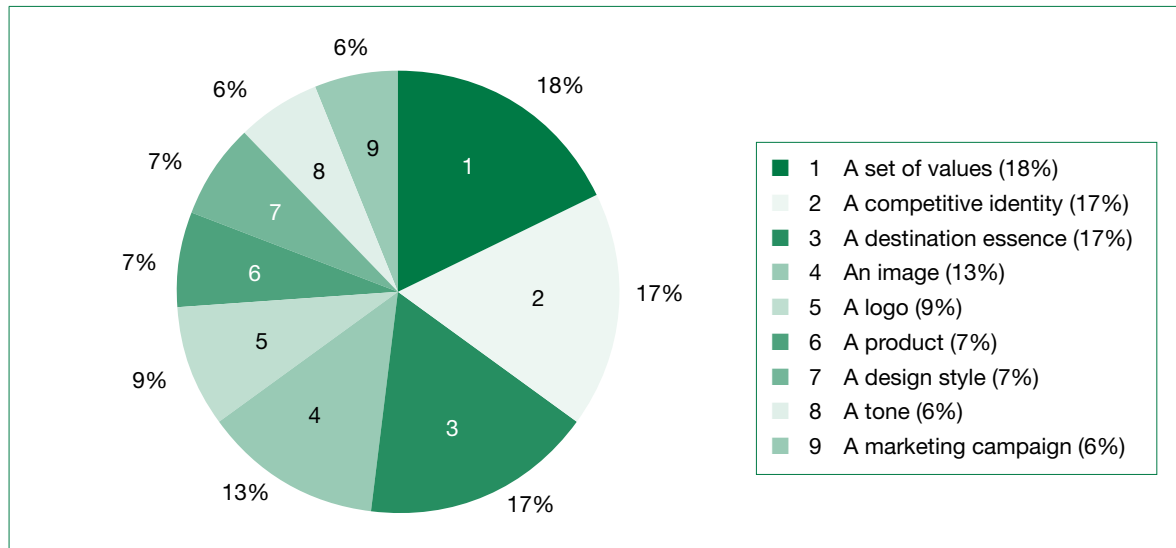
3 Research Findings

3.1 What Is a Brand?

Respondents were asked what they considered a brand to be. They were presented with 9 alternative meanings and asked to rate these from least to most relevant on a Likert scale ranging from 1 to 9 respectively.

The graph below illustrates the distribution of all responses on the high end of the scale (from 7 to 9). It becomes apparent that the majority of respondents believed a destination brand to be:

- A set of values (18%)
- A competitive identity (17%)
- A destination essence (17%)

Figure I.1 What is a brand? (%)

Respondents also availed themselves of the opportunity to give additional input, under a section entitled 'Other'. The following are quotes taken from this section:

- "In my opinion, a brand is more than just a logo, or a design style, or a particular look and feel, it is the sum of this that creates a lasting impression and perception in the minds of the consumer."
- "A relevant value which can be identified through the six senses."
- "[A] destination brand is [...] how [the consumers] feel when they arrive at the destination's website or experience other communication, and it is what they expect when they select one place over another based on all the elements that interact with the brand."

3.2 The Current Branding Practice of the Destination

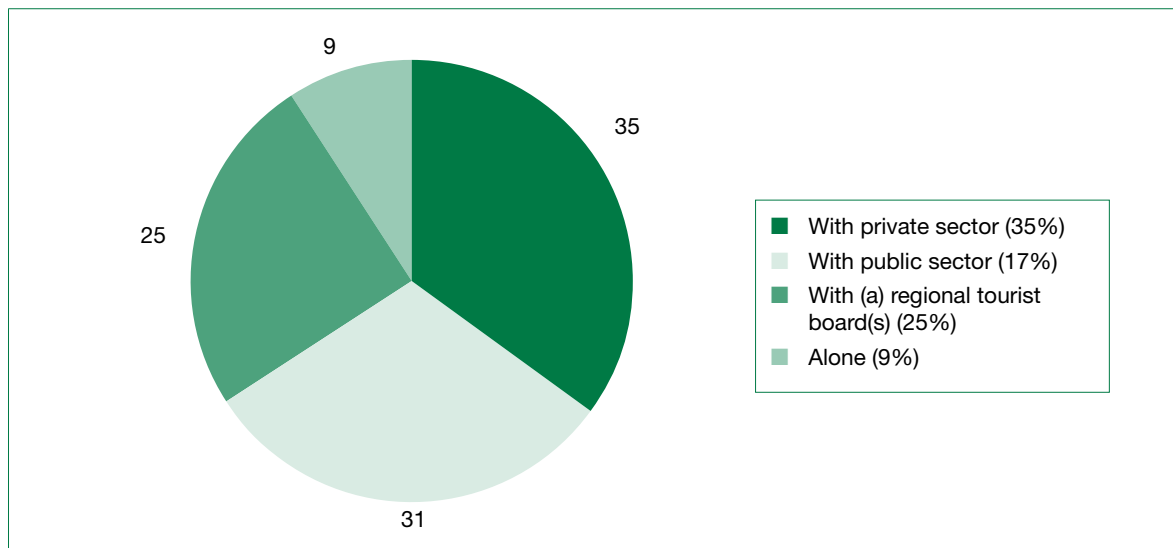
3.2.1 Stakeholder Involvement

This part of the questionnaire dealt with the development and current usage of the respondents' destination branding, particularly in relation to private and public stakeholders and regional destinations.

While 82% of DMOs professed themselves to have an official brand strategy, only 9% declared that they developed this strategy on their own (see figure I.2). The vast majority collaborated with private and public sector stakeholders and (a) regional tourist board(s).

23 DMOs gave multiple answers, the most popular combination bringing together all parties suggested in the question.

Figure I.2 Involvement from private sector or public sector stakeholders in the development of the official destination brand strategy (%)



Respondents also mentioned branding and advertising agencies as well as specialist consultants as having supported the strategy development

Consultation with stakeholders

Asked how they consulted with stakeholders, respondents referred to focus groups, workshops, working groups, online and personal questionnaires, seminars, and ‘numerous meetings’ as their most frequent tools for communication.

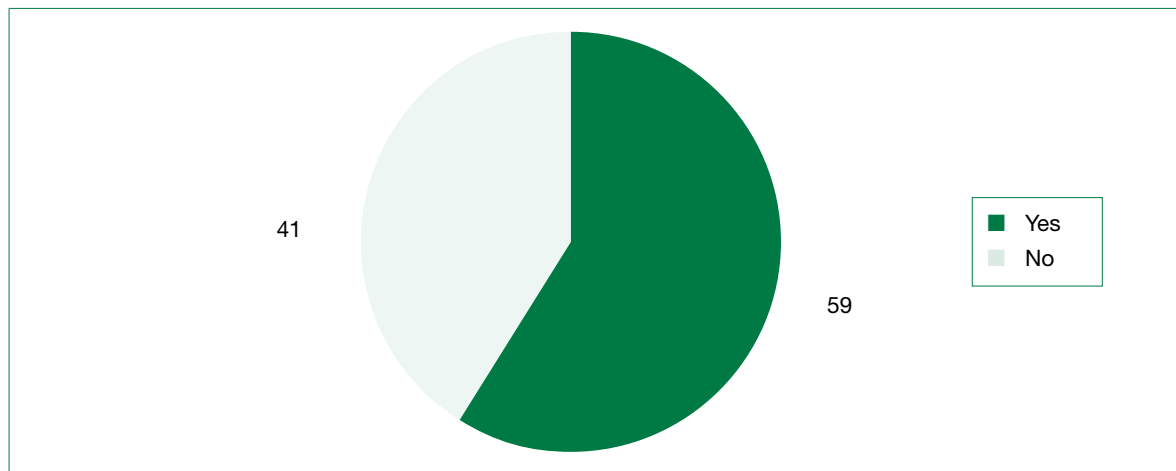
Consumer research/feedback and pre-tests using the infrastructure of overseas offices where possible also played a part.

Many respondents cited the use of expert advisory boards, which bring together a mixture of key stakeholders from the tourism industry and beyond, including, in one instance, non-tourism partners such as Sony and EMI. One country had identified both tourism and business as top economic contributors and its government gathered stakeholders from both sectors into an international marketing council tasked with the development of an integrated positive image for the destination.

Using the words of the respondents, the picture that emerges is one of “continuous” communication, incorporating “regular workshops held at each stage of the branding process”.

Co-ordination with regional destinations and products

59% of destinations stated that they had been influenced by the need to represent/include various regional destinations and products when developing their national tourism brand (see figure I.3).

Figure I.3 Influenced by need to represent/include regional destinations and products (%)

Asked how the national brand communicated this need, DMOs stated that:

- “We have put together promises that are valid in the entire country.”
- “We focus on [...] experiences that can be found in any of our regions.”
- “We work and develop the brand supports in a dialogue involving the main destinations.”
- “By adapting the regional and cultural uniqueness”.
- “The destination brand platform under development has an in built working process which automatically involves destinations and commercial partners.”
- “It [the national brand] reflects the diversity of [...] tourist products and unique experience which enhance other destinations and products sub brands.”
- “In all the joint actions appears the logo of [the country brand] with the logo of the region.”

Asked later to explain how the national brand is co-ordinated with regional and local brands in the destination, DMOs’ replies covered the spectrum from “regional and local authorities are obliged to use the destination brand identity elements” to “we provide guidance and direction; a series of seminars are planned”.

The national brand is referred to as an ‘umbrella brand’ and one respondent pointed out that, for them, there is no need for co-ordination overseas as only the national brand would be used in that case.

One destination outlined a highly systematic approach to coordination between the national and regional brands. Following an evaluation of the behaviour of the source markets, bilateral meetings are held between the national DMO and the regions discussing the participation of the regions in the implementation of the strategic plan. An extranet records the proposals resulting from these meetings and finally the national DMO signs agreements with the regions on the major joint actions and the financing of the plan. In advertising, the visuals are adapted according to the regional destination and the relevant products.

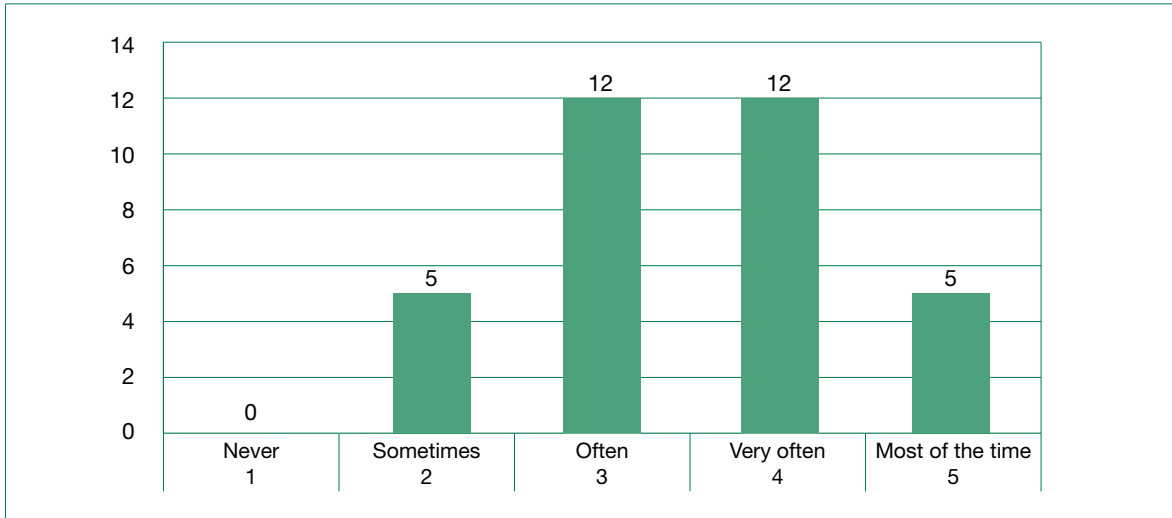
Some DMOs referred to the possibility of regional brands and products to use “parts and elements of the national brand communication profile in their own communication”, a reply that relates to the later question on the use of a brand tool kit (see 3.2.6 *Brand Toolkit*).

Answers to two subsequent questions underlined the importance that DMOs attach to the continued involvement by private and public sector stakeholders in the understanding and use of the brand:

- All respondents felt that it was very important or of the highest importance that stakeholders understood and supported the brand.

- Most DMOs believe that their stakeholders use the destination brand in their communication very often or most of the time (figure I.4).

Figure I.4 Extent of use of brand by stakeholders in their communication

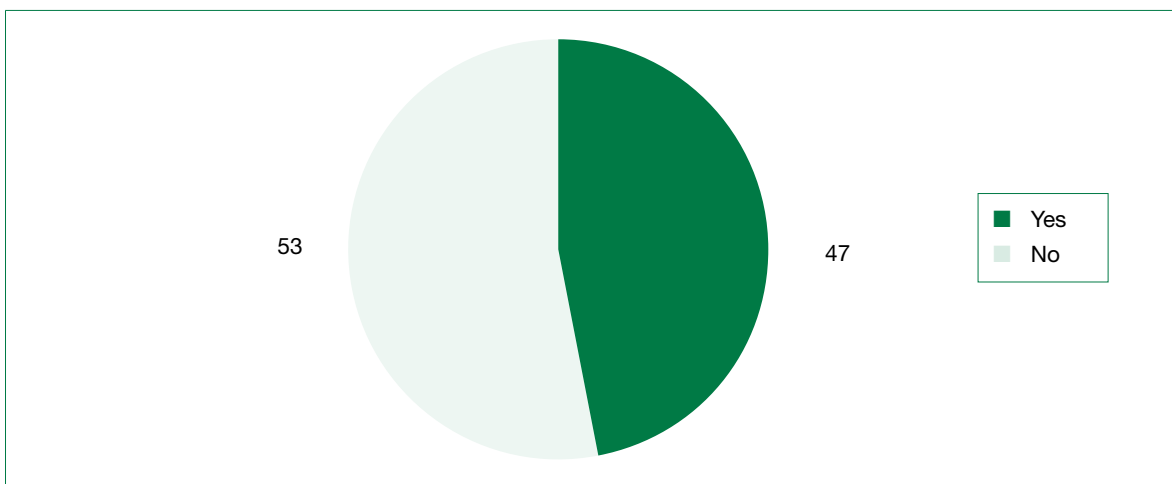


3.2.2 Use of the Brand

Destination brands appear to have a limited longevity: the answers to the question as to how long their current brand had been in use, pointed to a median ‘age’ of just over five years, with fewer than 29% of respondents declaring to have used their brand for ten years or over. Almost 12% of brands have been in use for less than a year or are being redesigned currently.

Branding is a relatively new business for many: The replies to the question as to whether the current brand replaced an earlier one, were almost split down the middle (see figure I.5).

Figure I.5 Did your current brand replace an earlier one? (%)



Most respondents’ brands are used just for tourism promotion (58%) but 36% proclaim it to be part of a bigger nation brand.

62.8% of DMOs are NOT involved in cooperative branding with other destinations.

3.2.3 Brand Values

An overwhelming 80% of NTOs have established a set of brand values for their destination.

Some brand value examples are:

- “creative, credible, contrasting, cool”;
- “passion, people, culture, destinations”;
- “indulgent, charming, abundant, vibrant”;
- “welcome, quality, freedom, authenticity, sensuality”;
- “rugged, natural, soulful, liberating”;
- “real-ness, fusion, can-do ness”;
- “open, innovative, authentic, caring”.

In addition, over 74% of DMOs declared to have developed unique positioning statements for their destination.

Some examples are:

- “small world – big experience”;
- “the island of unique character and characters”;
- “beyond expectations – within your reach”;
- “the heritage destination”;
- “freshness and experiences in pure and stunning nature”;

3.2.4 Brand Management

While nearly 37% of DMOs employ a dedicated brand manager for their destination, the majority entrust the branding responsibility to executives in existing departments. Prominent among these are:

- Marketing Manager;
- PR Manager;
- Director General or CEO;
- Chairman and Board of Directors.

3.2.5 Brand Measurement

Almost 63% of respondents measure the impact of their brand.

The most commonly mentioned tools were quantitative and qualitative market research and impact studies in target markets as well as monitoring of arrival statistics.

Other methods include image and consumer surveys, post campaign testing and exit polls at airports, as well as buying into or analysing the GfK Nation Brands Index.

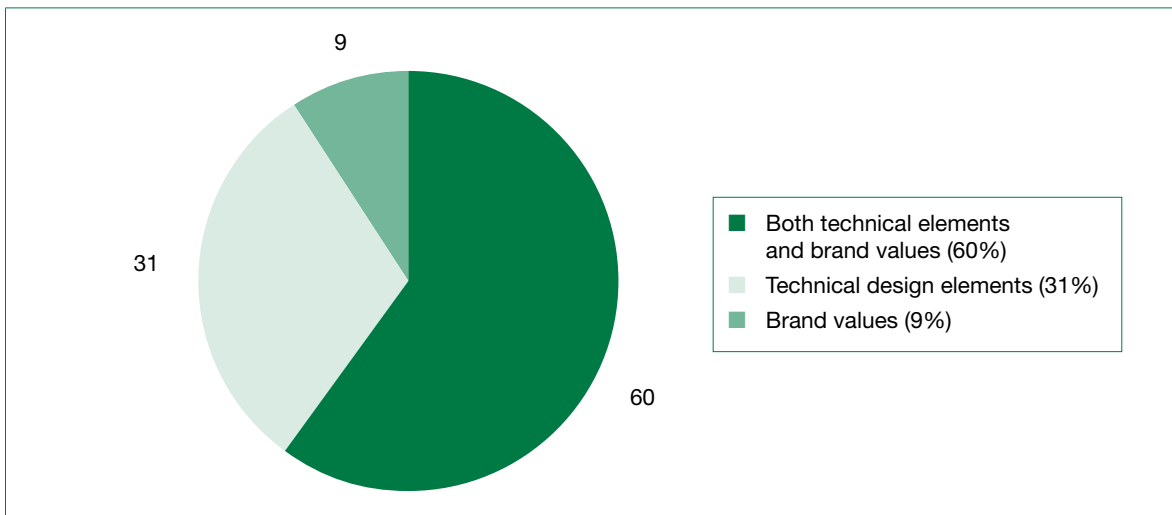
The most frequently cited mechanisms were (from 22 responses):

- Market research (10 = 45%);
- brand tracking studies (6 = 27%);
- visitor arrival statistics (2 = 9%);
- evaluation of effectiveness of promotional activities (2 = 9%);
- feedback from stakeholders (2 = 9%).

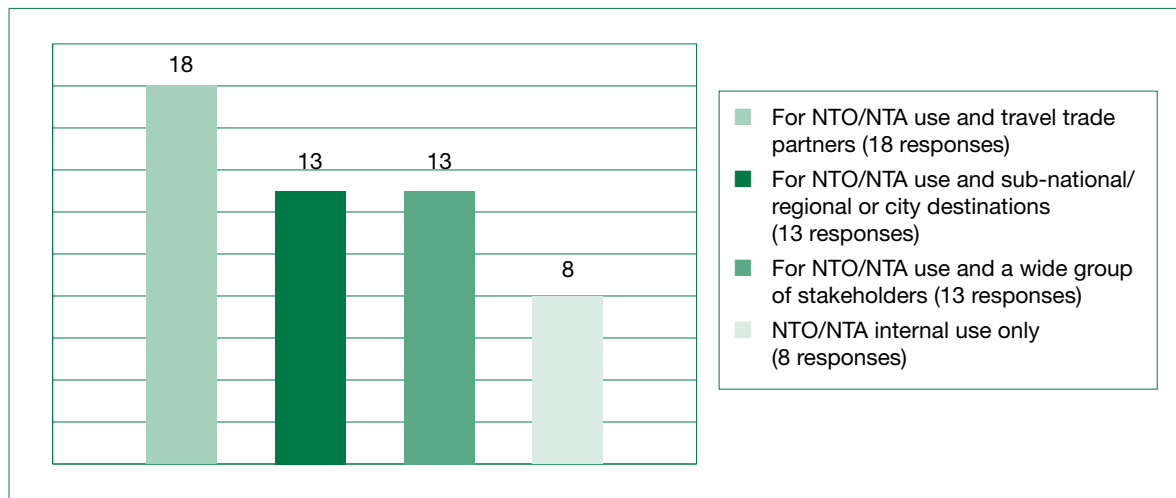
3.2.6 Brand Toolkit

Over 79% of respondents have a brand toolkit, with a majority of kits featuring explanations of both technical elements as well as brand values (figure I.6).

Figure I.6 Toolkit explanations (%)



Linked to the high level of communication between the DMOs and their stakeholders, the use of the toolkit appears to be widely spread among stakeholders (figure I.7). It is important to note that many respondents ticked more than one choice, most commonly joining the sub-national and trade partner usages.

Figure I.7 Who uses the toolkit

4 Good Practice in Destination Branding

4.1 Destination Exemplars

Asked which destinations they considered to be good at destination branding, respondents gave multiple responses (38 responses total). The destinations that gathered most 'votes' were:

1. New Zealand (10 = 26%)
2. India (7 = 18%)
3. Spain (7 = 18%)
4. Australia (5 = 13%)
5. Dubai (3 = 8%)
6. Ireland (3 = 8%)
7. Malaysia (3 = 8%)

New Zealand

Among the reasons for the perceived success of the New Zealand brand, respondents quoted the consistency and credibility of the message, the strong imagery, the use of an instantly recognised symbol (the fern, said to give a "clear proposition" to the brand) and a strong positioning statement ("100% Pure").

In addition, the DMOs felt that the brand was successful in going beyond tourism and had "managed to pull together stakeholders from all sectors under a unified brand".

In particular, respondents praised New Zealand for its courage in addressing their "far-off geographical location as being at 'the edge of the world' and [turning] their isolation into a positive. The brand leveraged the success of the 3-year production of Lord of the Rings to reinforce its openness and natural beauty."

In line with respondents' wish to explore expanding their brand into a country brand, New Zealand is recognised for having "developed a brand beyond tourism". One DMO believes that "this has been further enforced by their image globally, their foreign policy and the fact that it has become a preferred country to emigrate to".

India

In contrast, "Incredible India" is said to capture the "spiritual side and destinations available within such a diverse country". Respondents emphasised the "mystical positioning" of the brand, presenting "a powerful kaleidoscope of the destination and experiences on offer" in a coherent way through "extraordinary, sensual" imagery.

Spain

Another favourite, Spain, was praised for its "graphic strength" and described as a "very positive and optimistic brand". Respondents felt that it was able to bring together "regional and local partners under one umbrella brand" and that it "managed to change its image, away from cheap beach destination to a more upper-class cultural destination."

Australia

Commended for its appropriate tone of voice, the Australian brand is perceived as managing to "portray the carefree but high-quality lifestyle of Oz in their brand strategy and communications", using the "famous Aussie sense of humour [to] stand out amongst the clutter".

Respondents also felt that there was a widespread involvement and commitment from "politicians, export business, trade unions [and] citizens" in the success of the brand.

Malaysia

The "Malaysia Truly Asia" branding was highlighted for its "simplicity to convey attributes of an exciting and complex destination". One respondent believed that the tag line "works well with every product whether it is a festival, a shopping expedition, dining experience that is being promoted, needing as little a change as just the colour of the font to suit what is being promoted."

4.2 Other Insights

22 respondents availed themselves of the opportunity to highlight additional experience.

Aims and objectives

Aims and objectives for undertaking branding ranged from the general wish to "strengthen the attractivity [sic] and competitiveness [sic] of [the destination], give a more up to date image of the destination, federate the [...] trade under a common umbrella" and to "get the name of the country spread out widely" to the more specific need for increasing tourism value and volume and regional and geographical spread.

One DMO pointed out that there is a need to "analyse the brand architecture as we have a lot of regional, subregional and product brands. We want to know how is [sic] their influence on the [country] brand."

Lessons learnt

Asked about the lessons learnt, for themselves and other destinations, DMOs offered practical advice, stressing “the importance of **market research and monitoring tools, integrated marketing communication (IMC)** in both tools used and messages delivered”.

Most underlined the need to have a **close relationship and continuous communication with stakeholders**, both in the tourism field and beyond. In the words of one respondent:

“It is important that the brand is **close to the people** – the residents of the country and users of the brand, because they implement the brand and in that way the brand is not just a symbol but is alive with the people”.

And, while pointing out that “branding is a painful exercise and takes time – **patience** is the word”, respondents also maintain that “every destination is much more than its main attractive [sic]” and that “harmony can exist between conflicting elements!”

Glossary of Terms

This glossary explains how specific brand-related terms are used in this Handbook. These meanings are given as they are generally understood by branding practitioners, with an emphasis on destination branding practitioners. Some meanings may not correspond directly to, or provide as much detail as, academic interpretations of these terms. Where this is the case, they have been simplified for the sake of clarity and comprehension.

Attack brand: The dominant brand, usually in a sub-national, regional context, which leads in marketing communications promoting the area. It is usually defined in relation to slipstream brands, on whose behalf it leads the 'attack'. See *Slipstream brand*.

Brand: The terms *brand* and *competitive identity* are used synonymously in this Handbook. **Brand** refers to the collection of perceptions that a person has of a product (or destination) based on the product's (or destination's) observable characteristics, which differentiate it from all other products (or destinations), thereby endowing it with a competitive advantage over other similar products (or destinations).

Brand advocate: Someone who champions the cause of the brand within his/her own organization or sphere of influence. They are generally people who have executive authority for deciding whether or not to use the brand in their own organization's marketing communications. They are usually recruited by the NTO brand manager/guardian. They operate at a less senior, less public level than brand champions. See *Brand champion* and *Brand ambassador*.

Brand ambassador: A generic term, covering brand champions and brand advocates, to describe people (usually destination stakeholders) who have been officially appointed or asked to promote awareness and adoption of the brand amongst organizations in their sectors of influence. The term is sometimes also more loosely used to refer to the way in which people's behaviour reflects, or doesn't reflect brand values (e.g. "That sort of behaviour does not make him a great ambassador for the brand"). See *Brand advocate* and *Brand champion*.

Brand architecture: This refers to the way in which different brands within a destination (i.e. national and sub-national) are structured: how they relate to each other and how they are differentiated from each other. The relationship between them is based on the principle that they should all look as if they come from the same 'family' (i.e. country), but should still be individually distinctive within this framework of similarity.

Brand assets template: An inventory of products and experiences available in a destination, which correspond to particular brand values. This is usually used in conjunction with a brand-building model, such as the brand pyramid. Its purpose is to help NTOs and stakeholders identify which destination products and experiences might be used in marketing communications to reflect particular destination brand values.

Brand attributes: These are 'rational' attributes of a destination – the things that visitors like to do and see (e.g. Eiffel Tower, majestic scenery, etc.). They are objectively identifiable and not endowed with any emotional connotation (as opposed to 'emotional benefits', which describe visitors' feelings about a destination); but they tend to be attributes that contribute towards the destination's distinctiveness. They are usually identified through a destination audit.

Brand audit: An assessment of the way in which the brand is perceived amongst key target markets. This will usually include an analysis of the destination's products and experiences as well as people's

attitudes towards the destination. It will also look at the current brand position, and the way in which the brand has performed to date.

Brand awareness: This refers to people's awareness of the brand in key target markets. It is about the extent to which people are aware of the brand, not the esteem in which the brand is held.

Brand benefits: The benefits that people perceive they will obtain if they buy the brand/visit the destination. See also *Brand promise*.

Brand-building model: A useful technique that helps NTOs to develop a destination brand. There are several brand-building models, of which the brand pyramid and brand wheel are explained in detail in this Handbook. See *Brand pyramid* and *Brand wheel*.

Brand Champion: Someone who commands widespread respect within a broad community (e.g. across sectors and communities at national, regional or city level), who has been appointed (by the NTO steering group or government) to passionately champion the cause of the brand at the highest level in public. See also *Brand advocate* and *Brand ambassador*.

Brand compliance: The extent to which stakeholders reflect the brand in their marketing communications and behaviour. Brand-compliant behaviour is behaviour that reflects the brand values appropriately; non-brand-compliant marketing would be marketing communications that fail to reflect the destination's brand values adequately.

Brand equity: The value that a brand has endowed upon a destination (in terms of established perceptions of the destination in key target markets) compared to the value that would have accrued (again in terms of perceptions) if the brand had not existed.

Brand essence: The core essence of the destination that defines the brand; the main characteristics that underpin the destination's competitive identity. This usually comprises 3 to 4 core defining values.

Brand experience: The experience that visitors can expect to have when they visit the destination.

Brand extension: While this normally refers in consumer product branding to the launch of new products under the same brand name, it is used here to refer to the way in which destination stakeholders adopt the destination brand values in their own marketing communications, thereby extending the impact of the destination brand.

Brand identity: This is synonymous with the term logo. It is a visual design mark, which is used consistently on all destination marketing communications as a symbol of the destination. Its value comes from its consistent application over time, which encourages recognition of it as emanating from, and representing, that particular destination.

Brand integrity: This refers to the way in which the brand is perceived, or might be perceived. Maintaining a brand's integrity – in terms of a positive perception of the destination – is important. Allowing unsuitable companies, whose values do not reflect the destination's brand values, to associate themselves with the destination can damage the brand's integrity. So too can incidents, such as conflict or consistently poor service, which negatively affect people's perceptions of the destination.

Brand personality: The summation of the destination's character, which describes the way the destination is perceived and reflects people's attitudes towards it.

Brand position/positioning: The position that the brand occupies, or wishes to occupy, in people's minds in relation to its competitors.

Brand promise: The expectations that visitors have of the likely destination experience, as a result of the destination's marketing communications. See also *Brand benefits*.

Brand pyramid: A brand building model (one of several), which is a useful technique that helps NTOs to develop a destination brand. This incorporates the following elements sequentially to build up

the brand: rational attributes, emotional benefits, brand personality, positioning statement, brand essence/brand values.

Brand values: Values that define the brand essence. The brand essence usually comprises 3 to 4 core defining values.

Brand wheel: Another brand building model (one of several), which is a useful technique that helps NTOs to develop a destination brand.

Brand strategy: The entire strategic approach to developing and marketing a brand. This involves questions such as: Why do it? What does it look like? Who is it for? What are our objectives?

Branding: The process of building a competitive identity, or brand, for a destination (or a place): the process of developing and implementing a brand strategy.

Competitive identity: The terms *brand* and *competitive identity* are used synonymously throughout this Handbook. They refer to a summation of a destination's (or place's) characteristics that make it different and distinctive in the eyes of its potential visitors (or customers). This gives it a competitive edge, which makes it stand out from its competitors. See also *Brand*.

Competitive advantage: The advantage a destination has over its competitors as a result of its core brand characteristics, which make it distinctive and endow it with a competitive identity. Competitive advantage and competitive edge are used synonymously throughout this Handbook. See also *Competitive edge*.

Competitive edge: Competitive edge and competitive advantage are used synonymously throughout this Handbook. They refer to the elements that differentiate one destination from another and help them stand out positively above their competitors in the eyes of their main target markets. See also *Competitive advantage*.

Competitor analysis: The process of assessing a destination's competitive position in relation to its nearest competitors. This usually involves defining the destination's core appeals and then measuring its performance in terms of its actual product delivery, as well as people's perceptions, against each of these core appeals in relation to its competitors.

Country: The geographical entity, defined by national boundaries. It is not used with any specific brand-related connotation.

Country brand: Used synonymously with *nation brand*. Refers to a country's overall political, cultural and business image. This also includes a tourism dimension. See 'nation branding' under *Nation*.

Customer touchpoints: Critical points at which visitors interact with the destination (e.g. immigration, hotel reception, taxi drivers, guides, etc.), which have significant potential to influence their perceptions of the destination – positively or negatively. Also referred to as *Moments of truth*.

Creative execution: The way in which the brand is incorporated into marketing communications and the destination's core messages conveyed to the audience. This is usually the role of a specialist marketing agency, with considerable experience in interpreting core brand messages in a way that creates impact and makes them memorable amongst the target audience.

Destination: Refers to a country, region or city specifically as a *tourism* destination: a place that people wish to visit.

Destination product audit: An analysis of the destination's main products that contribute towards its distinctiveness. These are generally physical products (e.g. Eiffel Tower) and experiences (e.g. wildlife safari). They are objectively identifiable and not endowed with any emotional connotation (as opposed to 'emotional benefits', which describe visitors' feelings about a destination); but they tend to be attributes that contribute towards the destination's distinctiveness.

Destination brand: A destination brand refers to the collection of perceptions that a person has of a destination based on the destination's observable characteristics, which differentiate it from all

other destinations. It is also referred to as the destination's DNA – its core defining characteristics. See also *Brand*.

Emotional benefits: The way in which visitors feel, or can expect to feel, about a destination; otherwise described as 'emotional take-out'.

Geographic brands: Destination brands that are defined by their geographic boundaries (e.g. countries, regions, cities).

Leverage: The advantage gained by associating your product (or destination) with another product (or a destination) that already has a strong market position or brand image, whereby some of the benefits associated with the original product (or destination) will accrue to your product (or your destination). For example, a sub-national brand can leverage value from a national brand in terms of associated perceptions by being included in the national brand's website. This can also provide the sub-national brand with leverage in terms of market penetration and distribution that it would otherwise be unable to attain.

Logo: This is synonymous with the term *brand identity*. It is a visual design mark, which is used consistently on all destination marketing communications as a symbol of the destination. Its value comes from its consistent application over time, which encourages recognition of it as emanating from, and representing, that particular destination.

Market: A group of potential customers who have been identified as potentially interested in a particular product (or destination). *Market* is most frequently used in this Handbook to refer to countries, although not exclusively; whereas *market segment* is used more frequently to define a group of potential customers who have been identified as potentially interested in a particular destination.

Marketing: This covers the entire process of developing a product and promoting it to refining and redeveloping it, from initial consumer research through promotional campaigns to monitoring customer attitudes and sales. It is often misused to mean just promotion, which is just one element of the marketing process.

Marketing communications: Primarily used to refer to communications used to promote products (and destinations) and bring them to the attention of potential markets (e.g. advertising, PR, e-marketing, etc.). Mostly refers to promotion. See *Promotion*.

Moments of truth: See *Customer touchpoints*.

Nation: The sum of a country's economic, social and political activity. It is mostly used in this Handbook in relation to *nation-branding*. *Nation-branding* embraces the way a country projects itself in terms of its overall political, cultural and business image. This includes a tourism dimension.

Pan-regional brand: A destination brand that transcends national boundaries and encompasses several countries within a defined supra-national region, where there is perceived to be a reasonable degree of coherence between the component parts (or countries) (e.g. Southern Africa, Baltic States). See also *Supra-national brand*.

Promotion: The process of communicating a destination's (or place's) brand or competitive edge to potential visitors (or customers) through marketing communications. *Promotion* is just one element of *marketing*. See *Marketing*.

Place: is used mostly in the same way as *nation*, although it can refer to a nation, region or city: in a holistic way that encompasses a country's, a region's or a city's overall political, cultural and business image. This also includes a tourism dimension. Where it is used in this way **place** is usually associated with the terms *place-branding* or *place-marketing*.

- Otherwise **place** is used with its regular, lay meaning to describe somewhere (e.g. a country, region or city) without any brand-related or other specific connotation.
- The different uses of the term **place** should be clear from the context.

Place-branding: The process of branding a place (see *Place*) in a holistic way that encompasses a country's, a region's or a city's overall political, cultural and business image. This also includes a tourism dimension.

Rational attributes: The objectively identifiable assets of a destination. See *Brand attributes*.

Segment: A group of potential customers who share certain characteristics, which makes them more likely to buy a certain product (or visit a particular destination). Generally these shared characteristics provide the reason for a destination to target them in its marketing. See also *Market*.

Sense of place: The overall 'feel' of a place (whether a city, region or country), which reflects its core brand values. This is mostly associated with: its physical appearance and cultural heritage – from its built and natural environment to the way that it manages and presents its public realm and the type of events it puts on; the products it makes or is associated with; and the way its citizens behave.

Slipstream brand: A brand, usually at a sub-regional level, which has insufficient recognition to achieve market penetration on its own; it therefore leverages value through association with an 'attack' brand (e.g. in websites, brochures and marketing materials). See also *Attack brand*.

Slogan: A word, or more usually set of words, attached to a logo to describe a product (or destination). Slogans usually attempt, but often fail, to convey a destination's characteristics succinctly and uniquely. Synonymous with *strapline* and *pay-off line*.

Strapline: See *Slogan*.

Supra-national brand: A destination brand that transcends national boundaries and encompasses several countries within a large area or continent. Similar to a pan-regional brand, but usually larger, including more countries within a recognised entity, such as a continent (e.g. Europe). See also *Pan-regional brand*.

SWOT analysis: Analysis of a destination's strengths, weaknesses, opportunities and threats – but only those strengths and opportunities that endow the destination with actual or potential competitive advantage; and only those weaknesses and threats that significantly affect the destination's competitiveness.

Thematic brand: A brand structured around a theme. A theme consists of a collection of related experiences that are usually grouped together because they appeal to a particular market segment, or enable a destination to present itself more coherently, and in a way that has more market appeal and impact, than would otherwise be possible. (e.g. coastal trails, adventure activities, gourmet destinations). Themes can transcend geographic boundaries, particularly at a sub-national level and endow sub-national regional destinations, which might otherwise be relatively geographically non-descript, to establish a brand on the basis of known customer appeal.

Umbrella brand: An overarching brand, such as a country or nation brand, which is the main, high-level brand within a destination's brand architecture.

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منظمة السياحة العالمية

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Founded in 1948, the European Travel Commission (ETC) is a non-profit organisation whose role is to market and promote Europe as a tourism destination in overseas markets. ETC's members are the national tourism organisations (NTOs) of thirty-nine European countries. Its mission is to provide added value to members by encouraging exchange of information and management expertise and promoting awareness about the role played by NTOs.

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