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Destination branding – tracking brand equity for a competitive set of near-home destinations

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Destination branding – tracking brand equity for a competitive set of near-home destinations

Abstract

The topic of destination brand performance measurement is rare in the tourism literature. In particular there has been little reported about tracking destination brand performance over time. The purpose of this paper is to report the results of an investigation of brand equity for a competitive set of destinations in Queensland, Australia between 2003 and 2007. A hierarchy of consumer-based brand equity (CBBE) was trialled. It is proposed the CBBE hierarchy provides an effective means for practitioners to monitor and report brand performance over time. The hierarchy also provides destination marketers with a tool for debating the rationale for brand tactics with stakeholders. A key implication of the results was the finding that there was no change in brand equity for the five destinations over the four year period. This supports the proposition that destination image change occurs slowly over a long period of time.

Key words: destination branding, consumer-based brand equity, short breaks, destination image

Introduction

In the emerging literature related to destination branding, little has been reported about performance metrics. The focus of most research reported to date has been concerned with the development of destination brand identities and the implementation of campaigns (see for example, Crockett & Wood 1999, Hall 1999, May 2001, Morgan et al 2002). One area requiring increased attention is that of tracking the performance of destination brands over time. This is an important gap in the tourism literature, given: i) the increasing level of investment by destination marketing organisations (DMO) in branding since the 1990s, ii) the complex political nature of DMO brand decision-making and increasing accountability to stakeholders (see Pike, 2005), and iii) the long-term nature of repositioning a destination's image in the market place (see Gartner & Hunt, 1987). Indeed, a number of researchers in various parts of the world have pointed to a lack of market research monitoring destination marketing objectives, such as in Australia (see Prosser et. al 2000, Carson, Beattie and Gove 2003), North America (Sheehan & Ritchie 1997, Masberg 1999), and Europe (Dolnicar & Schoesser 2003).

The purpose of this study was to track brand equity for a competitive set of near-home destinations between 2003 and 2007. For this purpose the efficacy of a hierarchy of consumer-based brand equity (CBBE) was trialled. CBBE was first promoted by Aaker (1991) and more recently by Keller (2003) to supplement traditional balance sheet brand equity measures. The rational underpinning CBBE is that consumer perceptions of the brand underpin any financial estimate of future earnings estimated in the financial measure of brand equity. Since a financial balance sheet brand equity

measure will be of little practical value to destination marketers, the concept of CBBE is worthy of consideration by DMOs.

Literature review

Since the brand literature commenced in the 1950s (see for example Banks 1950), there has been consistent recognition that branding offers organisations a means for differentiation in markets crowded with similar offerings (Gardner & Levy 1955, Aaker 1991, Keller 2003, Kotler et al 2007). This is explicit in definitions of a brand, which have most commonly been variations of that proposed by Aaker (1991, p. 7):

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

Enhancing the ability of the brand to differentiate can generate advantages for the firm, such as purchase intent (Cobb-Walgren, Beal & Donthu, 1995), lower costs (Keller, 1993), increased sales, price premiums, and customer loyalty, (Aaker 1991, 1996). A DMO represents such a 'group of sellers'. Destination differentiation is critical in tourism markets since around 70% of international travellers visit only 10 countries, leaving the remainder of NTOs competing for 30% of total international arrivals (Morgan, Pritchard & Pride, 2002).

The destination branding literature emerged in the late 1990s (see Pritchard & Morgan 1998, Ritchie & Ritchie 1998). In the time since, the growing interest in the field has seen the publication of texts (see Baker 2007, Morgan, Pritchard & Pride, 2002, 2004) and the convening of the International Conference on Destination Branding in 2005 and 2007 (see Dioko, Najarro & So 2005, 2007). In this first decade of destination brand literature, there has been a lack of research reported about brand performance measurement over time. It should be noted however that brand metrics is also rare in the services marketing literature (Kim, Kim & An, 2003).

Aaker (1996) proposed a brand as comprising the brand identity, which represents self-image and aspired market image, and the brand image, which is the actual image held by consumers. The brand identity should underpin marketing strategy, which should be to focus on developing favourable brand associations, linking the brand's attributes to consumer needs (Keller, 2000). Research is therefore necessary to monitor the extent to which destination image is congruent with the brand identity. However, brand equity encompasses more than the image construct alone. Under International Accounting Standards, a brand's value cannot be brought to the balance sheet unless acquired for financial consideration (James, 2007). This is because of a lack of an agreed method for calculating brand equity. Of the different methods available to measure intangible brand equity, *Business Week* has for the past decade used that developed by brand consultancy Interbrand (www.interbrand.com) to calculate the value of the world's 100 top brands. Interbrand values brand equity based on a the net present value of future earning potential. The top ten brand values for 2007 are shown in Table 10.1, where it can be seen that the intangible Coca-Cola brand was valued at US\$70 billion. The tourism related Disney brand was ranked seventh, at US\$28 billion.

Table 1 – The world’s Top 10 brands in 2007

Brand	Brand Value US\$ Billions
Coca-cola	65.3
Microsoft	58.7
IBM	57.1
GE	51.6
Nokia	33.7
Toyota	32.1
Intel	31.0
McDonalds	29.4
Disney	29.2
Mercedes	23.4

Source: www.interbrand.com March 2008

Brand equity dependent variables commonly include financial performance (see Kim, Kim & An, 2003) and market share (see Mackay, 2001). Financial valuation is irrelevant if no underlying consumer-based value of the brand has been established (Keller, 1993). A more practical method of analysing brand performance by DMOs is the hierarchy of consumer-based brand equity (CBBE), proposed by Aaker (1991) and championed by Keller (2003). CBBE places emphasis on market perceptions, which underpin any financial valuation and provide a link between past marketing efforts and future performance. At the foundation of the hierarchy is *brand salience*, which represents the strength of the brand’s presence in the mind of the target. The goal should be more than achieving general awareness per se, but to be remembered for the right reasons (Aaker, 1996). *Brand associations*, which aid the consumer’s information processing, have been defined as “anything ‘linked’ in memory to a brand” (Aaker, 1991, p. 109). The aim should be to increase familiarity with the brand through repeated exposure and strong associations with the product category (Keller, 2003). Keller argued brand associations need to be strong, favourable and unique, in that order. The latter point dictates the measurement of associations needs to be within the context of a competitive set of brands (see Hooley, Saunders & Peircy, 2004). *Brand resonance* represents a readiness to engage with the destination, such as previous visitation. The highest level of the hierarchy is *brand loyalty*, which manifests in intent to visit, repeat visitation and word of mouth referrals. While a number of studies in other fields have identified associations between customer retention and increased profits (see Aaker, 1996, p. 22), there is a lack of literature relating to destination loyalty and switching costs.

A competitive set of near-home destinations was selected for the study, on the basis they would be more familiar to research participants. The geographic market of interest is Brisbane, which is the state capital of Queensland, Australia. Brisbane is the main source of visitors for each of the five near-home destinations selected. The five destinations were selected from a previous study that identified these as the most popular for short breaks (reference withheld). The destinations represent a mix of established and emerging destinations. For brand performance measurement purposes they have been defined by regional tourism organisation (RTO) boundaries: Gold Coast, Sunshine Coast, Northern New South Wales, Fraser Coast, and Bundaberg and the Coral Coast. Four of these RTOs are officially recognised by Tourism Queensland the state tourism organisation (STO). Tourism Queensland provides financial

assistance to these RTOs, much of which has been directed towards destination branding initiatives.

One of the catalysts for the research was the development of a new brand for Bundaberg and Coral Coast in 2003. The first stage of brand performance research commenced at the start of this new campaign, with the intent to monitor brand equity over time. The 2003 Bundaberg and Coral Coast brand was developed by the STO and RTO to achieve three key objectives, which mirror key aspects of the CBBE hierarchy:

1. to raise awareness of the destination
2. to stimulate increased interest in, and visitation to the region
3. to educate the market about things to do.

Given Brisbane residents' familiarity with the destinations, and the importance of the market to each destination, of interest was whether changes in equity would take place during the short term, in light of the proposition that destination image change takes place slowly over a long period of time (see Gartner, 1993).

A characteristic of a latent variable from a research participant's perspective is that it is not constant (DeVellis, 2003). A key construct of interest in this regard is 'destination image', which is representative of *brand associations*, and is one of the most published topics in the tourism literature. It might be expected that, for an individual consumer-traveller, some aspect of the destination's image will change over time, as well as between different travel situations (Barich & Kotler 1991, Crompton 1992). Therefore it is important in destination image research to explicitly identify the travel situation in which the research participant is expected to make judgements. The travel situation of interest in this project was a short break holiday by car, defined as a short break of between 1 and 4 nights away. Short breaks have emerged as one of the fastest growing travel segments in many parts of the world in recent years. For example, Vanhove's (2005) analysis of gross holiday participation data for countries in Europe between 1990 and 2002 identified a trend towards a decrease in general holiday participation, but an increase in short break activity. Similarly, in Australia, domestic tourism growth has stagnated over the past 20 years, with a noticeable trend towards shorter stays (Tourism Research Australia, 2008). Tourism Research Australia predicted average domestic trip duration to further decline from 3.9 nights in 2006 to 3.3 nights in 2020.

Method

The research involved three questionnaires distributed to Brisbane residents in 2003 and 2007. The 2003 study was undertaken longitudinally, with two questionnaires distributed three months apart. The first questionnaire was mailed in April to a random sample of 3000 Brisbane households selected from the telephone directory. The purpose was to identify characteristics of short breaks, including unaided destination preferences and attribute importance. A total of 523 completed questionnaires were received, representing a useable response rate of 19%. The second questionnaire was mailed in July to the 486 participants who indicated a willingness to participate in further research. This generated 308 completed questionnaires, representing a useable response rate of 63%. The purpose of this stage was twofold. The first was to analyse the association between stated destination

preferences and actual travel. This aspect of the research has been previously reported (reference withheld). The second was to identify brand equity benchmarks for the five destinations. The 2007 questionnaire was mailed in April to a new systematic random sample of 3000 Brisbane households selected from the telephone directory. The purpose was to compare brand equity with the 2003 benchmarks.

The CBBE hierarchy was operationalised similarly in 2003 and 2007. *Brand salience* was measured by two unaided awareness questions to identify i) each participant's top of mind awareness (ToMA) destination, and ii) the other destinations in their decision set. *Brand associations* were measured by asking participants to rate the perceived performance of each destination, across 22 cognitive scale items, and two affective scale items. The cognitive items were selected from a combination of literature review and group interviews with Brisbane residents. These were measured using a seven-point scale. A 'don't know' option was provided alongside each scale item. Affect was measured on seven-point semantic differential scales, selected from Baloglu (1997). In a separate section participants were also asked to rate the importance of each attribute, to enable importance-performance analysis (see Martilla & James, 1977). *Brand resonance* was measured by asking participants to indicate whether they had previously visited each destination. *Brand loyalty* was operationalised in 2007 with two questions. The first, which was not used in 2003, asked participants to indicate the extent to which they would recommend each destination to friends, using a seven point scale. The second asked participants to indicate the likelihood of visiting each destination in the following 12 months, using a seven point scale.

The back page of the questionnaire booklet was left blank, except for one open ended question asking participants if they had any comments to offer on how Queensland destinations could improve. A total of 95 of the 447 participants (21%) in 2007 provided comments. Basic content analysis identified 'pricing/packages' (32 comments) and 'accommodation issues' (21 comments) as the most popular themes. Other themes elicited from at least 10 participants included 'advertising', 'family needs' and 'touristy/overdevelopment'. The issues were generally consistent with those raised by the 2003 participants.

Results

The 2007 survey generated 447 completed questionnaires, representing a useable response rate of 17%. This response was similar to the 19% obtained in April 2003. As shown in Table 1, the characteristics of the 2003 and 2007 samples were similar, and were generally comparable to the characteristics of the 2001 Brisbane Census population.

The characteristics of short breaks were similar in 2003 and 2007. The data shows that short breaks represent an activity of interest to participants. For example, both the 2003 and 2007 samples indicated taking an average of three such trips per year. The mean importance for taking a short break each year, using a seven point scale, was 6.3 in both 2003 and 2007. In 2003, 62% had taken a short break in the previous three months, while in 2007, 86% had taken a short break in the previous 12 months.

Table 1 – Sample characteristics

		2003 n	2003 Valid %	2007 n	2007 Valid %
Gender	Male	199	38.0%	169	38.1%
	Female	324	62.0%	275	61.9%
	Total	521		444	
Age	18-24	16	3.1%	16	3.6%
	25-44	212	40.6%	166	37.5%
	45-64	244	46.7%	205	46.3%
	65+	50	9.6%	56	12.6%
	Total	522		443	
Annual household income	Less than \$78,000	372	73.2%	243	56.1%
	\$78,000 or more	136	26.8%	190	43.9%
	Total	508		433	
Marital status	Single	57	10.9%	50	11.3%
	Married/permanent partner	395	75.7%	335	75.6%
	Separated, divorced, widowed	70	13.4%	58	13.1%
	Total	522		443	
Number of dependent children	0	283	54.1%	238	53.5%
	1-2	182	34.8%	163	36.6%
	3+	56	10.7%	44	9.9%
	Total	521		445	
Highest level of education	High school	211	40.6%	149	33.5%
	TAFE	123	23.7%	101	22.7%
	University graduate	164	31.5%	147	33.0%
	Other	22	4.2%	48	10.8%
	Total	520		445	

Brand salience

In both 2003 and 2007, over 120 destinations were elicited in response to the unaided preferred destination question. In Table 2 these destinations are categorised by RTO region. Again the results were consistent, and therefore show little change in preferences between 2003 and 2007. In 2003 the mean number of destinations elicited in participants' decision sets was 3.8. The 2007 mean was 3.1. The 2003 longitudinal study showed an association between stated destination preferences and actual travel. The implication is that those destinations not included in decision sets are less likely to be selected in the short term. The difficulty for a destination to stand out from so much local competition is summed up by the following comment: *Most holiday places are based nearby the beach. This makes them very similar* (Participant #3).

Table 2 – Preferred destination

Destination	2003 Frequency	2003 Valid %	2007 Frequency	2007 Valid %
Sunshine Coast	231	45.1%	202	45.9%
Gold Coast	96	18.8%	72	16.4%
Northern NSW	57	11.1%	64	14.5%
Fraser Coast	33	6.4%	24	5.5%
Coral Coast	11	2.1%	6	1.4%
Other	84	16.5%	72	16.3%
Missing	11		7	
Total	523		447	

Brand associations

Table 3 shows the 2007 importance and performance ratings for the cognitive items. The Cronbach alpha for attribute importance was .79. The 2003 and 2007 data sets were pooled to enable independent-samples t-tests for the attributes common to both questionnaires. There was no significant improvement in perceived performance for any of the destinations.

Table 3 – Brand associations

Cognitive items	Importance 2007	Sunshine Coast	Gold Coast	Northern NSW	Fraser Coast	Coral Coast
Suitable accommodation	6.2	5.9	5.4	5.3	5.3	5.1
Good value for money	6.1	5.4	4.4	4.9	5.1	5.1
A safe destination	6.1	5.7	4.1	5.1	5.5	5.4
Affordable packages	5.4	5.1	4.5	4.7	4.7	4.9
Beautiful scenery	5.4	6.2	5.3	6.2	6.1	5.6
Pleasant climate	5.3	6.3	6.0	5.8	6.0	5.8
Within a comfortable drive	5.2	6.2	6.2	5.2	4.6	3.8
Uncrowded	5.2	4.5	2.7	4.5	5.0	5.0
Good cafes and restaurants	5.1	5.6	5.4	5.2	4.4	4.4
Friendly locals	5.0	5.0	3.7	4.9	5.1	5.2
Lots to see and do	4.9	5.7	5.7	5.4	5.4	5.0
Good beaches	4.8	6.2	6.0	5.9	5.6	5.1
High levels of service	4.7	5.5	5.3	5.0	4.6	4.4
Places for swimming	4.7	6.2	6.1	5.8	5.6	5.3
Not touristy	4.4	3.8	2.1	3.8	4.1	4.6
Places for walking	4.3	5.2	4.1	5.1	5.6	4.5
Family destination	4.3	5.8	5.1	5.1	5.6	5.4
Good shopping	3.9	5.2	5.7	4.4	3.7	4.0
Historical places	3.9	4.0	3.1	4.4	4.5	4.6
Marine life	3.9	5.3	5.0	4.9	5.5	5.3
Water sports	3.1	5.5	5.5	4.9	5.0	4.7
Trendy atmosphere	3.0	5.3	5.5	5.0	3.8	3.5

Given the closeness of many of the destination performance items, and to provide more meaningful positioning analysis, factor-analytic importance-performance analysis was used. In the initial factor analysis using Principal Components Analysis attributes only one variable (Suitable accommodation) did not correlate with any other variables at the .3 level. Following Child (1970), the cleanest rotated solution was obtained by omitting four variables: 'Suitable accommodation', 'Within a comfortable drive', 'Beautiful scenery', and 'Lots to see/do'. This solution generated five factors that explained 59.14% of variance. The Kaiser-Meyer-Olkin Measure of Sampling was .745 and Bartlett's Test of Sphericity was significant ($p = .000$). The five factors, each of which represent a positioning option, are highlighted in Table 4.

Table 4 – Factor Analysis

Factor	Alpha	Factor Loadings	Eigenvalue	Variance	Comm.
1. Upmarket	.73		3.925	21.8%	
Good cafes/restaurants		.78			.66
High level of service		.78			.65
Shopping		.70			.56
Trendy atmosphere		.60			.55
2. Beach	.72		1.929	10.7%	
Places for swimming		.82			.72
Good beaches		.81			.74
Good climate		.54			.41
3. Outdoors	.64		1.854	10.3%	
Marine life		.72			.59
Historical places		.65			.64
Walking tracks		.62			.45
Water sports		.59			.62
4. Escape	.66		1.640	9.1%	
Uncrowded		.83			.71
Not touristy		.66			.50
Friendly locals		.66			.52
5. Value for money	.57		1.290	7.2%	
Value for money		.78			.62
Safe		.73			.60
Affordable packages		.67			.58
Family destination		.42			.53
Total Variance				59.1%	

The means for the importance and destination performance for each factor are shown in Table 5. These results are plotted onto an Importance-performance grid in Figure 1 to highlight positions held by each destination on each factor. As can be seen, the Sunshine Coast rated first on Factors 2 (Beach), 3 (Outdoor activity), and 5 (Affordable). The Gold Coast rated first on Factor 1 (Upmarket), while the Coral Coast rated first for Factor 4 (Escape). It is proposed that these represent positioning opportunities for each destination.

Table 5 – Destination performance by factor

Factor	Imp.	Gold Coast	Sunshine Coast	Northern NSW	Fraser Coast	Coral Coast
1. Upmarket	4.14	5.43	5.38	4.87	4.05	4.02
2. Beach	4.90	6.02	6.20	5.80	5.73	5.38
3. Outdoor activity	3.78	4.47	5.00	4.81	4.81	4.82
4. Escape	4.84	2.82	4.38	4.29	4.69	4.89
5. Affordable	5.44	4.51	5.50	4.93	5.24	5.21

Figure 1 – Factor-analytic Importance-performance analysis

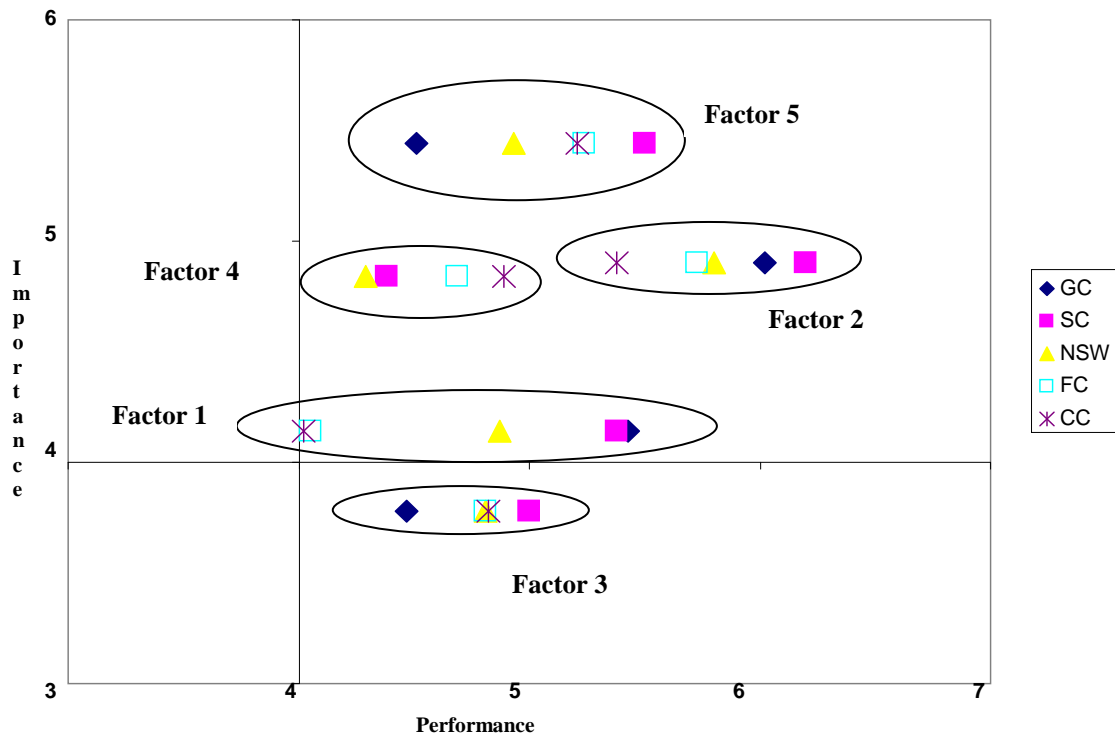


Table 6 shows the mean affect scores for each destination. The first figure is the 2003 score. Independent samples t-tests again identified no significant improvement for any destination between 2003 and 2007.

Table 6 - Affect

Affective items	Sunshine Coast	Gold Coast	Northern NSW	Fraser Coast	Coral Coast
Sleepy/arousing	5.2/5.1	5.3/5.3	4.6/4.6	4.3/4.3	3.8/3.7
Unpleasant/pleasant	5.0/4.6	6.1/6.0	5.4/5.3	4.3/5.2	5.0/4.7

Brand resonance

The number of participants who had previously visited their ToMA destination was 92% in both 2003 and 2007. This has implications for those destinations with low levels of previous visitation. For example, there was a low level of usage of the ‘don’t know’ option provided in the attribute rating scales, except in the case of the Coral Coast. This emerging destination attracted around 30% ‘don’t know’ usage for each destination performance item. This indicated a lack of awareness of the destination’s features, which is consistent with the low level of previous visitation relative to the other destinations. Previous visitation levels are highlighted in Table 7.

Brand loyalty

Brand loyalty was measured with two questions. The first, which was not used in 2003, asked participants to indicate the extent to which they would recommend each destination to friends, on a seven-point scale, anchored at ‘Definitely not’ (1) and ‘Definitely’ (7). The highest mean was for the Sunshine Coast (5.8), followed by Northern NSW (4.8), Fraser Coast (4.8), Gold Coast (4.4), and Coral Coast (3.9). The second question asked participants to indicate likelihood of visiting each destination within the next 12 months. As shown in Table 7, this was the only section where results were inconsistent between the 2003 and 2007 samples.

Table 7 – Previous and future visitation

	2007 Previously visited	2003 Likelihood of visit in next 12 months	2007 Likelihood of visit in next 12 months
Sunshine Coast	94.6%	6.0	5.1
Gold Coast	93.5%	5.5	3.9
Northern NSW	72.4%	4.3	3.7
Fraser Coast	64.9%	3.9	3.3
Coral Coast	42.8%	3.1	2.7

Conclusions

Gartner and Hunt’s (1987) investigation of image change for the state of Utah over a 13 year period indicated positive image change is possible for destinations. The results in this study support the proposition that destination image change occurs only slowly over a long period of time. There was little evidence of any change in brand equity for each of the five destinations over the four year period between 2003 and 2007. Rebranding and repositioning a destination’s image in the marketplace is therefore likely to require a significant and long term investment in resources. Researchers should be careful about recommending the use of rebranding and repositioning strategies for DMOs at all levels, but in particular for those with limited resources. In this study the destinations of interest included four well known and one emerging destination, each within a comfortable driving distance for a short break. For example the Gold Coast and Sunshine Coast are with a one hour drive of many Brisbane residents. It is suggested then that if image change is difficult for such

contiguous destinations, the magnitude of the challenge will increase exponentially for more distant and lesser known places. The objective of any brand positioning should be to reinforce the one or few determinant attributes for which the destination is already perceived positively and competitively. For example, while the emerging destination in this study, the Coral Coast, rated lowest in terms of previous visitation and decision set membership, a leadership position is held in the 'Escape' dimension. This represents a positioning approach that is not explicit in the brand launched in 2003, which is *Take time to discover Bundaberg and Coral Coast*.

Politically however, justifying changes to a destination brand is challenging due to the complex nature of stakeholder relationships and DMO decision making at a governance level (See Pike, 2005). DMOs are accountable to a diverse range of active and passive publics such as a board of directors, tourism sector groups, local taxpayers, and government, many of who will have different viewpoints that are not necessarily based on the holistic perspective expected by DMO management. In this regard it is proposed the CBBE hierarchy not only provides an effective means for practitioners to monitor and report brand performance over time, but also provides destination marketers with a tool for debating brand tactics with stakeholders.

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