

12-15-2006

## **An Analytic Image-Technology Inventory of National Tourism Organizations (NTOs)**

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An Analytic Image-Technology Inventory of National Tourism  
Organizations (NTOs)

A Thesis

Submitted to the Graduate Faculty of the  
University of New Orleans  
in partial fulfillment of the  
requirements for the degree of

Master of Science  
In  
Hospitality and Tourism Management

By

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December, 2006

## **Acknowledgement**

I am grateful to both Dr. Mehmet Erdem and Dr. Bridget Bordelon for providing the guidances for this thesis. I would also like to thank Dr. Harsha Chacko for serving on my thesis committee. I wish to thank Dr. John Williams, the Director of Lester E. Kabacoff School of Hotel, Restaurant and Tourism Administration, for his assistance and support. I would like to express gratitude to Dr. Amy Dellinger of the College of Education and Human Development for her instruction and encouragement. I am also thankful to Dr. James Perry of English Department for his input and generosity.

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## **Abstract**

The Internet is playing an increasingly crucial role in destination marketing and it is used as a major marketing tool among National Tourism Organizations (NTOs). Website design is influential for consumers' Website preference and destination selection. This study is to understand the application of image-based technology by the major National Tourism Organizations (NTOs) through the collection and comparison of static images and dynamic images presented in their official tourism Websites. Data collected from the sampling of the world's top 25 tourism destination nations reveals that all National Tourism Organizations (NTOs) use either static images or dynamic images for their Websites, but the use of static images are far more popular than that of dynamic images.

Key Words: Website Design, Image-based Technology, Static Image, Dynamic Image, Destination Marketing, National Tourism Organizations (NTOs).

# CHAPTER 1

## 1. INTRODUCTION

### 1.1 Background of the study

The steady growth of tourism activities and the number of international tourists make tourism one of the most notable economic and social phenomena in the last century.

According to a press release by the World Travel and Tourism Council (WTTC), the economic output of tourism is expected to total 10.3 per cent of GDP in 2006, and the people employed, directly and indirectly, by major organizations making up the global tourism industry will reach a total of 234.3 million jobs (World Travel and Tourism Council, 2006).

The number of international tourists has grown from 25 million international arrivals in 1950 to an estimated 763 million in 2004, an all-time record according to World Tourism Organization (WTO, 2006). During that period, the fastest growth went to the Asia Pacific region with an average of 13 percent each year. The total share of the international tourist market in the Asia region has steadily increased from a single digit to 20 percent in the past 50 years (WTO, 2006). Many factors contributed to the growth of international arrivals in the Asian countries such as Hong Kong, Malaysia and Thailand. It has been reported that the National Tourism Offices (NTOs) of the aforementioned countries played a significant role in formulating a coherent marketing strategy and coordinating various marketing activities, such



as the effective use of the Internet (World Tourism Organization, 2006).

A National Tourism Office or National Tourism Organization (NTO) is a country's official tourism organization, and its responsibility is to develop the tourism of its country through promotion, research, and marketing (Kosters, 1994). Overall, the roles of NTOs are similar to that of states or local tourism organizations, particularly in the area of tourism promotion. But, in practice, NTOs are the most powerful travel promoters for destinations because the scopes of their marketing efforts are at the national level (Mill, and Morrison, 1998; So, and Morrison, 2004). The activities developed by National Tourism Organizations can be divided into two types: tourist information and tourist promotion. Tourist information is deemed a traditional and passive way to distribute information of destinations to potential tourists. Tourist promotion plays a much more active and aggressive role in attracting potential tourists by using consumer-oriented concepts and marketing strategies (Kosters, 1994; So, and Morrison, 2004).

One could consider tourism as a product. Promoting the tourism product is different from promoting other kind of products because of the uniqueness of its information-intensive quality and the characteristics of its heterogeneity, its intangibility, its perishability, and its international and service scope (Weaver, and Lawton, 2000). The tourism product is also complex and consists of multiple components. Coordination and cooperation between each component to make a successful trip require an efficient, accurate and timely information

flow. Consumers need detailed information about the destination or product to substitute for the lack of tangibility. The intangible nature of the tourism product has brought the information technology (IT) and tourism industries together to creatively market the product and make it tangible (Sheldon, 1997).

For example, if a convention facility is not sold on a given schedule, that particular schedule can never be sold again. Perishability is true for almost all products in the tourism industry due to the perishable nature of services. The tourism industry is one of the most international of industries in the world. The information required planning international travel and its geographic dispersion requires data communication networks around the world. Speed is increasingly important for service expectations, and information technologies have been identified as one of the most important elements to enable efficient services (Sheldon, 1997).

The growth of international tourism and the ensuing competition for a bigger share of the tourist market forces NTOs to constantly adjust their marketing strategies and seek effective marketing tools. Since information is one of the key elements to effectively promote the business in the travel and tourism industry, the role of Information Technology (IT) becomes more important in the development of tourism marketing (Buhalis, 2003). The integration of Information Technology (IT) into the organization structure of the destination marketing organization is an important key to success in the tourism industry (Werthner, and Klein, 1999).

Consequently, the emergence of Internet technology was a major consideration by NTOs, and the concept of Web-based marketing became a dominant strategy to promote destinations and to communicate with potential visitors (Werthner, and Klein, 1999). Website-based marketing helps traditional and e-commerce companies build up their sales and improve customer relations through the presentation of multimedia and interactivity (Zhou, 2004, and Buhalis, 2003). In the hospitality and tourism industry, quality websites developed by destination organizations have proven to be a powerful medium that could change people's opinions and formulate favorable images (Kelley, 2004), as well as a marketing tool that could create a new distribution system to bypass travel intermediaries, or to open a new communication channel to improve customer relationships (Cox, and Koelzer, 2004).

Of all the recent technological developments in the past 10 years, the Internet and Website technologies have had the most significant impact on tourism and tourist promotion by major NTOs. The importance of Website-based marketing to redefine the service and operation in tourism and hospitality and to promote international tourism is undeniable. The use of Website marketing can make the destination more competitive and provide much needed distribution channels to reach travelers and travel intermediaries. Information Technology (IT) provides a way for destination marketing organizations to improve accessibility, accuracy, comprehensiveness, timeliness and quality of information on the

destination's facilities and thereby improve the quality of service provided (Sheldon, 1997).

Because of the rapid rise of Websites' importance and popularity, both academics and practitioners have devoted their efforts and proposed a variety of approaches to understand the design of Websites in the development of tourism markets through analysis of Web page content and design (Morrison, Taylor, and Douglas, 2004). In terms of approach and focus, the majority of research studies attempted to understand the effectiveness and the functionality of Website design from the aspect of marketing and promotion. Several studies were also conducted to examine the relationship between the employment of multi-image and positive attitudes toward Websites by consumers (O'Connor, 2004; Coyle, and Thorson, 2001; Jeong, and Choi, 2004). A thorough review of related literature, however, revealed no past research studies that focused on content analysis of websites based on image technologies utilized in such websites (Baggio, 2003; Burgess, Cooper, Cerpa, and Sargent, 2004; Douglas, and Mills, 2004; Kim, Morrison, and Mills, 2002; Maswera, Dawson, and Edwards, 2003; Morrison, Mills, Chuvessiriporn, and Ismail, 2002; So, and Morrison, 2004; Mohammed, 2004; Yuan, Gretzel, and Fesenmaier, 2003).

## **1.2 Research Justification & Rationale**

According to the Travelers' Use of the Internet, 2005 Edition released by Travel Industry Association of America, 56% of American adults aged 18 or older claimed they

currently used the Internet, either at home, work/school or both, and 84% of the current users of the Internet are travelers. By March 2006, the penetration of world Internet usage has reached 15.7% and the usage growth from 2000 to 2005 has reached 183.4% worldwide (Internet World Stats, 2006). The Internet has become a practical means available by which tourist organizations can reach most of their customers scattered around the world and it has also become a perfect vehicle for the travel industry as online travel Websites to provide travel planners an efficient and effective way to book travel (Travel Industry Association of America, 2005). Tourism development has been treated as an attractive national policy for many nations, especially some small developing countries, to promote economic growth and to attract foreign investment (Mill, and Morrison, 1998; Mohammed, 2004). The Website of a tourist organization becomes a very important extension of the organization that might very well be used to assimilate information and to portray the image of the organization and the destination (Maswera, Dawson, and Edwards, 2003).

Not only has the ever-growing potential of Websites as a marketing tool reshaped the idea of communication and interaction for destination marketing organizations (Wober, 2003), it has also changed the role of NTOs from mere information distribution and destination administration towards global marketing and destination management (Dierich, Sy, and Schertler, 2002). To further understand this ever-changing technology in the development of destination marketing, studying the effectiveness and the design of tourism Websites has

become increasingly important (Zhou, 2004).

A Website is regarded as a new medium opposed to the traditional media such as: television, newspaper and magazine. This medium permits a message, in all forms of infinite length, to be transmitted to any place in a matter of minutes. One of the main reasons that Websites have grown in popularity is their ability to support graphics. Graphic design is very important if a Web page is to be visually attractive to its reader (Hanna, and Millar, 1997). Increasingly, people select the Internet instead of traditional media to research travel related information. The image and impressions reflected by Websites through their presentations of pictures and photos play key roles in the decision-making process by potential travelers (Jeong, and Choi, 2004).

The most common images used on a Website can be divided into two categories: static images and dynamic images. Dynamic images refer to images in motion. The technologies of dynamic images used on web-cites include: video, interactive audio/video, and animated graphic/picture and others. Static images refer to still pictures and photos. Examples include graphic or image based pictures, still photos/graphics, charts and slides (English Online, 1996).

### **1.3 Statement of Purpose**

The purposes of this study are: (1) To analyze the technology based image of the

first-pages of the NTO Websites for the 25 most visited countries (2) To document the two main types of image-based technologies (static and dynamic) utilized in such Websites and provide an inventory to classify and document the level of such use.

A review of the most visited destinations' NTO Websites in terms of image-technology content could prove to be useful for understanding the numbers of technology-based images employed and types of image technologies used and for future related research focusing on this aspect of web-content analysis.

#### **1.4 Research Objective**

There are two main research objectives that have been addressed by this study.

- (1) To analyze and tabulate the type of dynamic-image technologies that are present in the first pages of the NTO Websites of the 25 most visited countries.
- (2) To analyze and tabulate the type of static-image technologies that are present in the first pages of the NTO Websites of the 25 most visited countries.

## **CHAPTER 2**

### **2. LITERATURE REVIEW**

#### **2.1 Introduction**

The literature review is divided into several sections. These areas are organized so that National Tourism Offices/Organizations are discussed first, the function of National Tourism Offices/Organizations is explored next, and thirdly, Website studies of National Tourism Offices/Organizations are reviewed. Finally, the discussions of Web-based marketing and of criteria for Web design analysis are also included.

#### **2.2 National Tourism Offices/Organizations (NTOs)**

Kosters (1994) defined a National Tourist Organization as a country's official organization that is responsible for the development of promotion, research and marketing of a country. The roles of NTOs can be different according to the governmental status given by specific countries. They may be governmental and part of the civil service system; they may be a government agency or bureau responsible for tourism and set up as a large or larger department; and they may be a quasi-public government-funded commission. Mexico Tourism Board (MTB) is regarded as an independent ministry because MTB is a combination of government and civil service system. Tourist Authority of Thailand is considered as a governmental agency and it usually carries more function and responsibility than that of the



National Tourism Organizations. The British Tourist Authority and The Hong Kong Tourism Board are good examples of quasi-public government-funded organizations. A key advantage of these government-funded organizations is that they have greater management flexibility in dealing with business aspects of tourism marketing and promotion. Regardless of their different government status, the roles of NTOs affect the development of tourism industry and all elements of the tourism destination mix for each nation (Mill, and Morrison, 1998).

### **2.3 Function of National Tourism Offices/Organizations (NTO)**

The functions of NTOs in promoting a country's tourism business are varied according to policy, funding, and organization. Traditional functions of NTOs are to distribute printed material on demand to potential visitors. The rapid growth of international tourism has forced NTOs to change (So, and Morrison, 2004). McIntosh, Goeldner, and Ritchie, (1995); Weaver and Lawton, (2000) indicated both Canada and Australia had very comprehensive tourism programs supported by their strong National Tourism Offices, Tourism Canada and Australian Tourist Commission, respectively. The prime functions of their tourism offices are to coordinate marketing programs, to stimulate consumer demand, to promote international attendance and to provide travel information. In Europe, Kusters (1994) divided activities used by European NTOs based on target segments. Activities developed to directly attract tourists include publicity programs, tourism shows, direct mail and advertising

campaign. Programs frequently used to lure the segment of trade were arrangement of package tours and study trips, organization of workshops and seminars, design of incentive tour and information distribution. Various NTOs have distinct functions in promoting tourism because of different goals and strategies; nonetheless, NTOs have an especially important role in tourism marketing, and marketing has become one of their dominant functions (Pearce, 1992). For example, the mission of VisitBritain, the National Tourism Organization of the United Kingdom, is to build the value of tourism throughout Britain and throughout the year by creating world-class destination brands and marketing campaigns ([www.visitbritain.com](http://www.visitbritain.com)). One of the primary responsibilities of the Hong Kong Tourism Board is to market and promote Hong Kong as a destination worldwide ([www.discoverhongkong.com](http://www.discoverhongkong.com)).

#### **2.4 National Tourism Offices/Organizations (NTO) Websites**

The Internet has become the most significant development in communication since the invention of television and the printing press (Morrison, Mills, Chuvessiriporn, and Ismail, 2002). Studies directly related to the Websites of NTOs were few. Most researchers in the area of Website marketing studied the Websites presented by regional or local destination organizations.

Maswera, Dawson, and Edwards, (2003) used the on-line tool Bobby and the test software LIFT to study the websites of tourism organization from South Africa, Kenya,

Zimbabwe and Uganda; the data collected was used to compare their usability and accessibility. Kim, Morrison, and Mills, (2002) utilized the model of Critical Success Factors to examine the Websites of 10 major convention centers in the U.S. in terms of technical, marketing and customer; the results revealed convention centers' Websites were underdeveloped in comparison with other tourism Websites for travel agents, airlines and hotels.

Douglas, and Mills, (2004) explored the extent of Website marketing used by National Tourism Organizations in the Caribbean to promote their destinations. The top 10 NTO Websites in the region were selected; the modified Balanced Scorecard (BSC) for Website evaluation was employed. A team of seven panelists was organized to evaluate and compare the differences of Websites' design in the aspects of technical, user friendliness, site attraction and marketing effectiveness among 10 Websites. The results indicated that the interactive Internet marketing strategy was fully used by Caribbean NTOs to develop their Websites. Website Visitor Retention (WVR) Model was also applied to create an initial retention ranking using the results collected from BSC, but the relationship between BSC results and WVR ranking was not discussed. Using the BSC model, So, and Morrison, (2004) compared 14 NTO Websites in the East Asia region and identified their Internet marketing strengths and weakness. Baggio, (2003) was another example to use content analysis to evaluate the quality of design among 16 European NTO Websites. The evaluation criteria of the first step included

first impact, design and graphics, information content, interactivity and services, structure and navigation, and technical management. The factors used for the mapping of the contents and services offered on the Websites are informational content, customer relationship, interactive services and e-commerce. The results indicated most of the NTO Websites did not meet their full potential even though their nations were on the list of world-top tourism destinations.

## **2.5 Websites as Marketing Tools**

Although Web-based marketing and Internet-based technologies have been widely utilized by the travel and tourism industry to market services (Morrison, Mills, Chuvessiriporn, and Ismail, 2002), research conducted to understand the impact of Websites on the number of visitors to a destination and to explore the concept of NTO Websites as marketing tools is still limited. Several studies in the past focused on content analysis but limited information was provided on content analysis to image-based technical aspects of Websites (Douglas, and Mills, 2004).

Tourism is an extremely information-intensive industry. The information-intensity of travel and tourism is a key driving force in the rapid diffusion of technology in the industry. All players in the tourism industry will be affected by Information Technology (IT) (Poon, 1993). The importance of Information Technology (IT) in tourism has increased

tremendously in the past decades, and more destination management organizations have realized that Internet marketing is becoming a major part of their overall marketing functions (Wang, and Fesenmaier, 2003).

Use of the Internet by travelers to plan and book their trips continues to grow at a rapid rate. The importance of Internet marketing is on the rise in hospitality and tourism because the Internet provides a more efficient way to reach potential customers than the traditional marketing in terms of time, speed, market segmentation; data collecting means, information distribution and brand building (Zhou, 2004). According to a report released by World Tourism Organization Business Council in 2001, when on-line travelers started planning their trips on-line, they were using travel agents less often, ordering travel brochures by phone less often, placing fewer calls directly to airlines, rental companies and hotels. A report released in 2005 by Travel Industry Association of America also indicated more than half (52%) of travelers used the Internet for travel planning and 43% used it to make travel reservations (Table 2.1). Destination marketing organizations including NTOs quickly grab the concept of Internet marketing and develop their own Websites to enable their competitiveness and market presence (So, and Morrison, 2004).

**Table 2.1 Report of Internet Use in 2005**

	U.S. Adult Population	Traveling Population*
	216.1 million	151.8 million
Online Travelers	47%	67%
Use the Internet and made travel plans online	37%	52%
Use the Internet and made travel reservations/bookings online	30%	43%
Use the Internet and traveled for business in past year	14%	20%
Use the Internet and traveled for pleasure in past year	44%	63%
Use the Internet and traveled frequently in past year (took five or more trips in the past year)	22%	31%

Source: Travel Industry Association of America

\*A traveler is defined as an adult who took at least one trip 50+ miles

Not only do quality tourist Websites attract and retain potential travelers, they also directly reflect the quality and image of the destination they represent (Zhou, 2004). The need to analyze the design and effect of tourist Websites and to identify their strengths and weaknesses has become extremely important to the study of tourist Websites, which has attracted more attention by researchers in recent years. In spite of different philosophies and research techniques, the evaluation of Destination Marketing Organization Websites relies primarily on qualitative methods. This is achieved by collecting and analyzing user or expert opinions, or by applying quantitative measures, or a combination of quantitative and qualitative assessment. (Wober, 2003)

Wober (2003) also indicated that the collection of volume of page views, numbers of visits or queries retrieved through automated web site analyzing tools including web content mining and web usage mining tools were reliable methods in studying the effectiveness of

tourism web sites in terms of navigation, interactivity, layout and textual features. Mohammed (2004) investigated the national Websites of 44 small developing countries and found that the function of state Websites was more promotional than self-presentation. One theory introduced by Yuan, Gretzel, and Fesenmaier, (2003) is to use adoption and diffusion concepts to explain key factors affecting the use of Internet technology by destination marketing organizations and classify them into five adopter groups: laggards, sophisticated followers, knowledge adopters, early light adopters and late light adopters. Another study found that purchase decisions on destination cities are made on the basis of available information and the projected and perceived images of places (Hannam, 2004).

## **2.6 Tourism Website Evaluation**

Among the major methods of Website evaluation for tourism and hospitality, the Balanced Scorecard (BSC) approach and the extended model of Internet Commerce Adoption (eMICA) are the two most visible models adopted by academics and researchers (Morrison, Taylor, and Douglas, 2004; Burgess, Cooper, Cerpa, and Sargent, 2004).

Alastair Morrison and Stephen Taylor initiated the BSC approach in 1999. The main concept is to examine the effectiveness of Websites in tourism and hospitality through evaluating four perspectives as technical, marketing, customer, and destination information. The major studies on Government Tourist Offices' Websites are listed as follow: Kim,

Morrison, and Mills, (2002) conducted an evaluation of the performance of the Websites of 10 first-tier U.S. convention centers and So, and Morrison, (2004) used the approach of content analysis to compare the Websites of 14 NTOs in East and South East Asia.

The Model of Internet Commerce Adoption (MICA) was originally developed for a study in the Australian metal fabrication by Lois Burgess and Joan Cooper in 1998 (Burgess, and Cooper, 1998). MICA consists of three stages of Web-based promotion, provision of information and service, and transaction processing following three levels of business process. The stages of development provide a roadmap that helps identify where a business is in its development of Internet commerce application (Burgess, Cooper, Cerpa, and Sargent, 2004). According to Burgess, and Cooper, the eMICA model adds several layers of functionality and innovation within the three main stages, in order to accommodate the wide range of Internet commerce development unique to the tourism industry (Burgess, Cooper, Cerpa, and Sargent, 2004).

Based on the concept of the eMICA model, the stages developed to assess the selected Websites have three parts: promotion, provision and processing. The sample functionality used to study the selective Websites include company name, physical address and contact details, area of business, annual report, email contact, information on company activities, product categories, hyperlinks to further information, on-line enquiry form, customer support, industry-specific value-added features, chat room, discussion forum, multimedia, newsletters



or updated by e-mail, secure on-line transactions, order status and tracking, interaction with corporate servers and database (Burgess, Cooper, Cerpa, and Sargent, 2004).

The major studies on destination marketing organization's Websites using eMICA are listed as followed: Larson and Ankomah use this 3-stage approach to measure the degree of sophistication of the websites of 20 U.S. state tourist organizations and to understand the complexity of their development (Larson, and Ankomah, 2004), Doolin Burgess and Cooper also use the same model to evaluate the level of Web sites development in NZ Regional Tourism Organization (Doolin, Burgess, and Cooper, 2002), and another study to assess the differences of the extent of adoption and level of integration of web technologies for 286 Regional Tourism Organization in the Asia Pacific Region and 118 Chilean Regional Tourism Organization was conducted by Burgess, Cooper, Cerpa and Sargent in 2003.

## **2.7 Criteria for Web Design Analysis**

In terms of design criteria required to develop an attractive and efficient Website, Werthner, and Klein, (1999) suggested a list that includes innovative, graphical presentation, media adequacy, links, hypermedia structure, interface and animation. Sigala, (2004) revealed that the impact of e-shopping orientations influences e-shoppers' expectations on Website design feature, and identified the design for effective Websites should consider aesthetic value including visual appeal and entertainment value, playfulness value including escapism

and intrinsic enjoyment, customer ROI including efficiency and economic value, and service excellence. Toh, and Pendse (2002) used both qualitative and quantitative methodology to identify the judgment criteria for best Websites from users' perspective; 12 items were selected as follows: (1) speed of retrieval, (2) ease of navigation, (3) graphics for visual impact, (4) effective communication, (5) contents, (6) usability and functionality of Website, (7) use of the latest Web techniques, (8) general overview, (9) innovation, (10) interaction between users and the Website, (11) maintenance, (12) readability. Graphics or visual is considered as one of major criteria to evaluate a quality Website based on the above studies.

Website design evaluation in tourism and hospitality is still in its beginning stage. The volume of study is scarce, and techniques used for evaluation are quite different. Nevertheless, some researches in relation to the use of picture or text to explore the effectiveness of tourist-related Websites provide a foundation to develop this study.

O'Connor (2004) used the method of content analysis to identify the best approach to design a quality Website between presentation and usability. Although no clear winner could be identified, the studies did indicate that photos on travel Websites helped potential travelers in making purchasing decisions. The study also revealed that a combination of text and picture was more effective at selling the tourism product than text content only.

According to Coyle, and Thorson (2001), the increase of interactivity and vividness would lead readers to have more positive attitude toward Website, strong feeling of

telepresence, and greater attitude-behavior consistency. Sixty eight people were invited to explore four websites as assigned. The result confirmed participants who saw sites high in vividness would develop attitudes that endure over time. Vividness is defined as the representational richness of a mediated environment as defined by its formal features. Rich media tools like video, audio and animation on tourist Website increase vividness by enhancing the richness of experience.

Jeong, and Choi, (2004) further suggested that the content and realism of picture presentations are important predictors of customers' attitudes toward the Website and designed a two-stage research study. First, this study conducted a content analysis with 203 current hotel Websites located in New York City to catch the trend of picture presentation. Then, 560 students were selected and equally distributed to eight Websites to evaluate effects of picture presentations on customers' attitudes as well as their behavioral intentions. Findings of this study revealed customers tended to have more favorable attitudes toward the hotel if pictures of hotel, service personnel and guests appear on the hotel Website. The results indicated that because of the presentation of pictures, the evaluators could mentally visualize the overall image of the hotel and the benefits of the services and imagine actually experiencing the service.

Pictures on a Web site have a direct impact on people's perception on the services presented. To further understand how the WTO Websites use pictures and picture-related

multi-images, this study has selected six image-related criteria divided by static images and dynamic images to explore the utilization of image-based technologies.

## CHAPTER 3

### 3. METHODOLOGY

#### 3.1 Research Design

This is an exploratory study which includes an inventory of technology-based images collected from selected NTO Web pages was utilized to understand the quantity and types of image technologies present. Through the comparison of the quantity and types of multi-images, the findings provided a different angle to analyze the trend to use image-based technologies among the major destination tourism organizations.

#### 3.2 Sampling Study

To best understand the utilization of image-based technology for the Websites introduced by the most popular destination nations, the model of purposeful sampling was employed (Creswell, 2005). The samples of 25 major NTO Websites were selected because they are the official Websites for the NTOs of top 25 destination countries in the globe in terms of the number of international tourist arrivals, according to World Tourism Organization (WTO) ([www.world-tourism.org](http://www.world-tourism.org)). Of the 25 most popular destination nations, sixteen are in Europe, three are from the

**Table 3.1 World's Top Tourism Destinations**

Rank		International Tourist Arrivals (million)		Change (%)	Share (%)
		2003	2004	2004/2003	2004
	World	690	763	10.7	100
1	France	75	75.1	0.1	9.8
2	Spain	51.8	53.6	3.4	7
3	United States	41.2	46.1	11.8	6
4	China	33	41.8	26.7	5.5
5	Italy	39.6	37.1	-6.4	4.9
6	United Kingdom	24.7	27.8	12.3	3.6
7	Hong Kong	15.5	21.8	40.4	2.9
8	Mexico	18.7	20.6	10.5	2.7
9	Germany	18.4	20.1	9.5	2.6
10	Austria	19.1	19.4	1.5	2.5
11	Canada	17.5	19.2	9.2	2.5
12	Turkey	13.3	16.8	26.1	2.2
13	Malaysia	10.6	15.7	48.5	2.1
14	Ukraine	12.5	15.6	24.9	2
15	Poland	13.7	14.3	4.2	1.9
16	Greece	14	-	-	-
17	Hungary	-	12.2	-	1.6
18	Thailand	10	11.7	16.5	1.5
19	Portugal	11.7	11.6	-0.8	1.5
20	Netherlands	9.2	9.6	5.1	1.3
21	Russia Federation	8.5	9.2	7.5	1.2
22	Saudi Arabia	7.3	8.6	17	1.1
23	Macao	6.3	8.3	31.9	1.1
24	Croatia	7.4	7.9	6.8	1
25	Ireland	6.8	7	3.2	0.9

Source: World Tourism Organization (WTO)  
(Data as collected by WTO May 2005)

region of the Americas and the rest are from Asia and the Pacific (Table 3.1).

The process for the identification of sampling and the collection of data were divided into three stages. The search of National Tourism Organizations or Offices of top 25 destination nations started from the first week of April 2006. The identification of their official tourism Websites began at the second week of April. The collection of data from the Websites was completed by the end of third week of the same month.

Two well-known meta-search engines, Google Search Engine ([www.google.com](http://www.google.com)) and Yahoo Search Engine ([www.yahoo.com](http://www.yahoo.com)), were employed because of the capacity of their databases to search for the selected websites in the area of travel and tourism. Initial searches revealed that the key word of “national tourism organization” was only able to identify several official Websites. With the inclusion of the key words of “national tourism board,” “tourism office” and “tourism commission,” 24 official tourism sites were found. All destination nations as selected have their designated organizations to oversee tourism development and tourist promotion, 24 out of 25 nations have official tourism Websites except Ukraine (Table 3.2). Ukraine, ranked the 14<sup>th</sup> among 25 world’s top tourism destinations, has its State Tourism Commission to oversee tourism-related policies and programs; but it doesn’t have its own official tourism Website to introduce Ukraine yet. The promotion of this destination nation on the Web is either by way of private-owned Websites or through

**Table 3.2 NTOs of World's Top Tourism Destinations**

<u>Rank</u>	<u>Nations</u>	<u>National Tourism Organizations</u>	<u>Official Websites</u>
1	France	French Government Tourist Office	<a href="http://www.franceguide.com">http://www.franceguide.com</a>
2	Spain	Spanish National Tourist Office	<a href="http://www.tourspain.es">http://www.tourspain.es</a>
3	United States	Office of Travel & Tourism Industry	<a href="http://tinet.ita.doc.gov/">http://tinet.ita.doc.gov/</a>
4	China	China National Tourist Office	<a href="http://www.cnto.org">http://www.cnto.org</a>
5	Italy	Italian State Tourist Board	<a href="http://www.enit.it">http://www.enit.it</a>
6	United Kingdom	British Tourist Authority	<a href="http://www.visitbritain.com">http://www.visitbritain.com</a>
7	Hong Kong	Hong Kong Tourism Board	<a href="http://www.discoverhongkong.com">http://www.discoverhongkong.com</a>
8	Mexico	Mexico Tourism Board	<a href="http://www.visitmexico.com">http://www.visitmexico.com</a>
9	Germany	German National Tourist Board	<a href="http://www.germany-tourism.de/">http://www.germany-tourism.de/</a>
10	Austria	Austrian National Tourist Office	<a href="http://www.austria-tourism.at/">http://www.austria-tourism.at/</a>
11	Canada	Canadian Tourism Commission	<a href="http://www.travelcanada.ca">http://www.travelcanada.ca</a>
12	Turkey	Turkish Culture & Tourism Office	<a href="http://www.tourismturkey.org">http://www.tourismturkey.org</a>
13	Malaysia	Malaysia Tourism Promotion Board	<a href="http://www.tourismmalaysia.gov.my/">http://www.tourismmalaysia.gov.my/</a>
14	Ukraine	State Tourism Administration	N/A
15	Poland	Polish National Tourist Office	<a href="http://www.polandtour.org/">http://www.polandtour.org/</a>
16	Greece	Greek National Tourism Organization	<a href="http://www.gnto.gr">http://www.gnto.gr</a>
17	Hungary	Hungary National Tourist Office	<a href="http://www.hungarytourism.hu">http://www.hungarytourism.hu</a>
18	Thailand	Tourism Authority of Thailand	<a href="http://www.tourismthailand.org">http://www.tourismthailand.org</a>
19	Portugal	Portuguese National Tourism Office	<a href="http://www.visitportugal.com">http://www.visitportugal.com</a>
20	Netherlands	Netherlands Board of Tourism	<a href="http://www.holland.com/">http://www.holland.com/</a>
21	Russia	Russian National Tourist Office	<a href="http://www.russia-travel.com/">http://www.russia-travel.com/</a>
22	Saudi Arabia	Supreme Commission for Tourism	<a href="http://www.sct.gov.sa">http://www.sct.gov.sa</a>
23	Macau	Macau Government Tourist Office	<a href="http://www.macautourism.gov.mo">http://www.macautourism.gov.mo</a>
24	Croatia	Croatian National Tourist Board	<a href="http://www.croatia.hr">http://www.croatia.hr</a>
25	Ireland	Irish Tourist Board	<a href="http://www.ireland.ie/">http://www.ireland.ie/</a>

Source: Google Search Engine and Yahoo Search Engine



the web pages set up by the Office of Foreign Affairs as part of embassy propaganda functions.

The initial page of many NTO Websites included a welcoming page, used mostly as a language-selecting page. The mentioned Websites include France, China, Britain, Hong Kong, Mexico, Canada, Saudi Arabia, Macau and Croatia. Instead of using the welcoming page, the first page of 24 NTO Websites was used for evaluation in agreement with the concept that the build-up of a destination's impression starts from the first page (Chiang, Erdem, and Bordelon, 2006). The first page of individual Website studied was stored in a file and documents as shown (Appendices).

### **3.3 Coding Criteria**

Image-based technologies defined as dynamic images and static images utilized in these sites were studied. Dynamic images refer to images in motion. The technologies of dynamic images used on web-cites include: video, interactive audio/video, and animated graphic/picture. Static images refer to still pictures and photos. Examples include graphic or image based pictures, still photos/graphics, charts and slides (English Online, 1996). Different from other types of content analysis approaches designed to identify their variables after the contents have been observed, an *a priori* design was utilized and the variables were selected before the beginning of observation (Neuendorf, 2002). Divided by the categories of

dynamic images and static images, six technical evaluation criteria were initiated as follows:

1. Dynamic images

- Animation graphic / picture: moving graphics or pictures are created by computer animation.
- Automated slide show: a display of a series of chosen pictures or photos is conducted by a computer running presentation software.
- Motion pictures / streaming videos / with audio: which include short-videos, video-clips and live-feeds from web-cams.
- Motion pictures / streaming videos / without audio: which include short-videos, video-clips and live-feeds from web-cams.

**Figure 3.1 Sample of Dynamic Image**



Source: <http://www.discoverhongkong.com>

## 2. Static images

- Still photo / picture:
- Graphic / icon / banner

**Figure 3.2 Sample of Static Image**



Source: <http://www.tourspain.es>

The results were tabulated and categorized separately on the basis of the nature of the criteria, and they were used to achieve the following research objectives.

- (1) To analyze and tabulate the type of dynamic-image technologies that are present in the first pages of the NTO Websites of the 25 most visited countries.
- (2) To analyze and tabulate the type of static-image technologies that are present in the first pages of the NTO Websites of the 25 most visited countries.

### **3.4 Data Collection**

In order to reduce data to manageable representations, instead of studying the pages of the entire site, only one page, the first page of Website, was studied for the utilization of image-based technology (Krippendorff, 2004). The unit of technology-based image has been counted and classified on the basis of the variables as such: animation graphic / picture, automated slide show, motion pictures / streaming videos / with audio, still photo / picture and graphic / icon / banner. The variable of motion pictures / streaming videos / without audio was removed because all 24 official Websites did not include that as part of their image-based technologies. Excel software was used to tabulate the data collected. Rank and ratio, organized by frequency compiled by descriptive statistic data, were used to present the results of analysis of the data.

**Table 4.1 Evaluation of First Page of World's Top NTO Websites**

NTO Websites	<u>Static Image</u>		<u>Dynamic Image / Multimedia</u>			<u>Total</u>
	<u>still photo / picture</u>	<u>graphic / icon / banner</u>	<u>automated slide show</u>	<u>streaming video / with audio</u>	<u>animation graphic / picture</u>	
France	7	4	0	0	1	12
Spain	0	7	0	0	1	8
United States	6	3	0	0	0	9
China	1	1	1	0	1	4
Italy	1	6	1	0	0	8
United Kingdom	2	4	0	0	0	6
Hong Kong	8	5	2	1	3	19
Mexico	5	2	0	0	3	10
Germany	4	3	1	0	1	9
Austria	5	4	0	0	1	10
Canada	2	3	0	0	0	5
Turkey	3	4	0	0	0	7
Malaysia	4	4	0	0	1	9
Ukraine	0	0	0	0	0	0
Poland	0	2	1	0	1	4
Greece	15	2	0	0	0	17
Hungary	0	10	1	1	1	13
Thailand	6	9	2	0	1	18
Portugal	6	2	0	0	1	9
Netherlands	10	3	0	0	1	14
Russia	5	5	0	0	1	11
Saudi Arabia	2	2	0	0	0	4
Macao	0	5	0	0	2	7
Croatia	3	13	1	0	0	17
Ireland	9	5	0	0	2	16
Total	104	108	10	2	22	246

Note: Ukraine does not have an NTO Website.

## CHAPTER 4

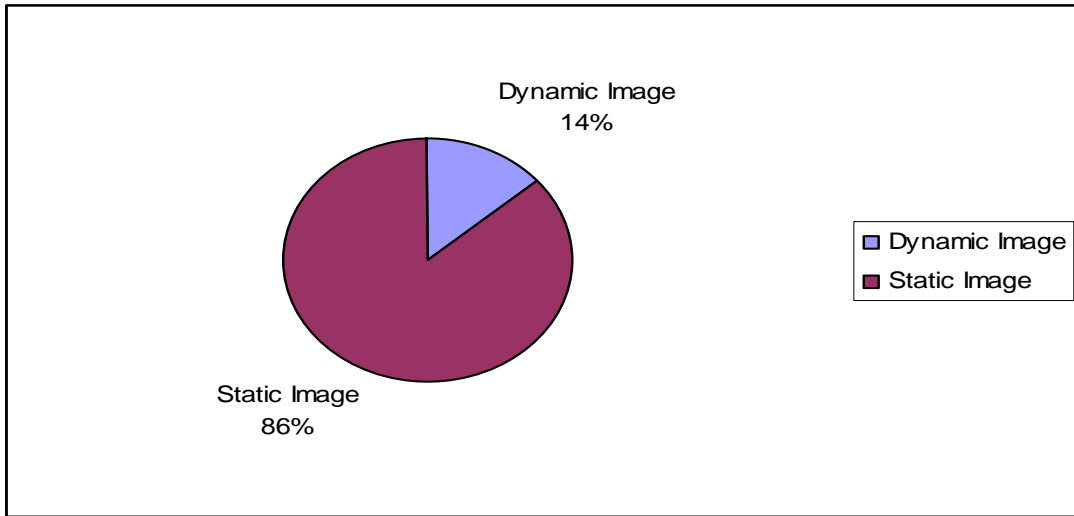
### 4. RESULTS AND DISCUSSION

#### 4.1 Results

Using animation graphic / picture, automated slide show, motion pictures / streaming videos / with audio, still photo / picture and graphic / icon / banner as coding criteria, a total of 246 technology-based images have been collected from 24 official tourism Websites from April 2 to April 20 2006.

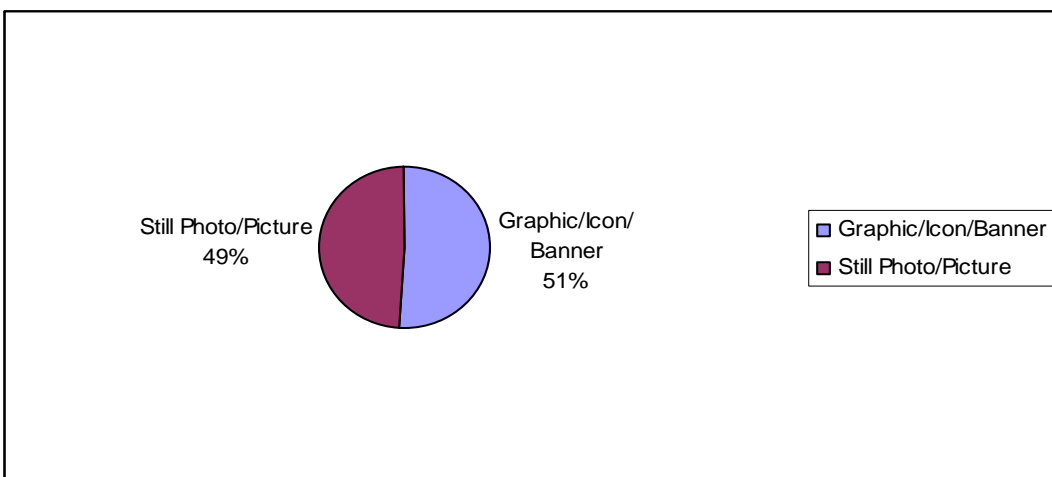
Table 4.1 provides an indication of how the 24 National Tourism Organizations apply both static images and dynamic images to their official Websites. Overall, the utilization of static images is far more common than dynamic images by NTOs. As shown in Figure 4.1, in terms of the ratio between the application of static image and dynamic image, a total of 212 units of static images, accounting for 86 % of total units, are identified as opposed to 34 units of dynamic images, accounting for 14 % of total units.

**Figure 4.1 Ratio of Image counts**



Still photo/picture and graphic/icon/banner are almost evenly divided in the category of static image (Figure 4.2). The application of animation graphic/picture outnumbered

**Figure 4.2 Ratio of Static Image**



the combination of automated slide show and motion picture/streaming video/with audio in the category of dynamic image/multimedia (Figure 4.3).

**Figure 4.3 Ratio of Dynamic Image**

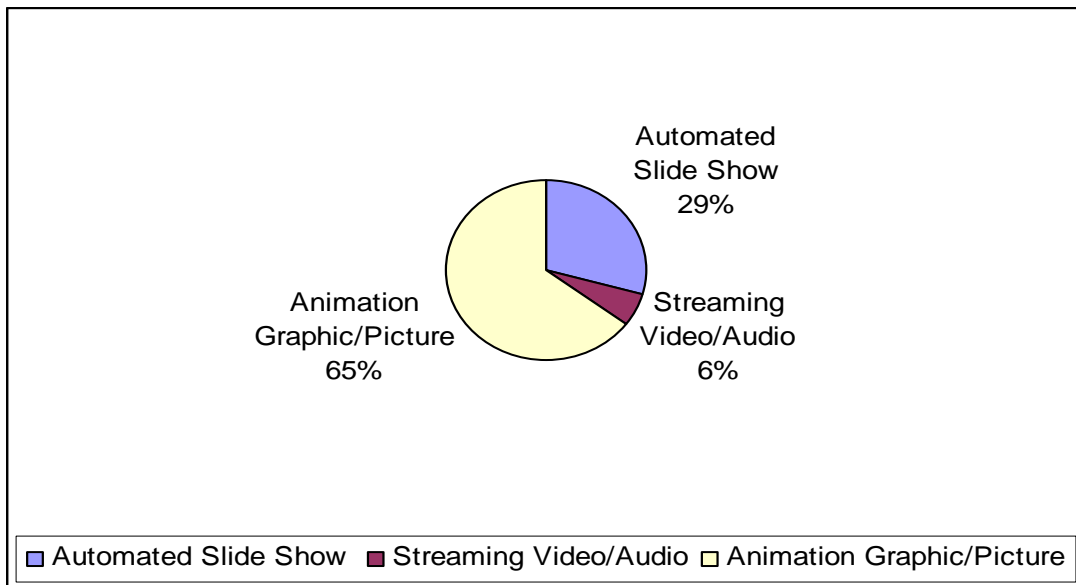


Table 4.2 shows how diversified the 24 National Tourism Organizations use both static images and dynamic images to present their official Websites. Hong Kong is the only country applying all five image-based technologies to its official Website. Following that, four countries from both Europe and Asia including Germany, Hungary, China and Thailand use four out of five major image-based technologies for their Websites.



**Table 4.2 Use of Image-based Technology by World's Top NTO Websites**

NTO Websites	<u>Static Image</u>		<u>Dynamic Image / Multimedia</u>			<u>Total</u>
	<u>still photo / picture</u>	<u>graphic / icon / banner</u>	<u>automated slide show</u>	<u>streaming video/ with audio</u>	<u>animation graphic / picture</u>	
France	1	1	0	0	1	3
Spain	0	1	0	0	1	2
United States	1	1	0	0	0	2
China	1	1	1	0	1	4
Italy	1	1	1	0	0	3
United Kingdom	1	1	0	0	0	2
Hong Kong	1	1	1	1	1	5
Mexico	1	1	0	0	1	3
Germany	1	1	1	0	1	4
Austria	1	1	0	0	1	3
Canada	1	1	0	0	0	2
Turkey	1	1	0	0	0	2
Malaysia	1	1	0	0	1	3
Poland	0	1	1	0	1	3
Greece	1	1	0	0	0	2
Hungary	0	1	1	1	1	4
Thailand	1	1	1	0	1	4
Portugal	1	1	0	0	1	3
Netherlands	1	1	0	0	1	1
Russia	1	1	0	0	1	3
Saudi Arabia	1	1	0	0	0	2
Macao	0	1	0	0	1	2
Croatia	1	1	1	0	0	3
Ireland	1	1	0	0	1	3
Mean						2.83

N = 24

In terms of the number of technology-based images used by the 24 National Tourism Organizations, Hong Kong is ranked first as a result of a total usage of 19 images (Table 4.3). Thailand is right behind Hong Kong; Croatia and Greece; two countries from Europe share the third place. China, Saudi Arabia and Poland are in the last

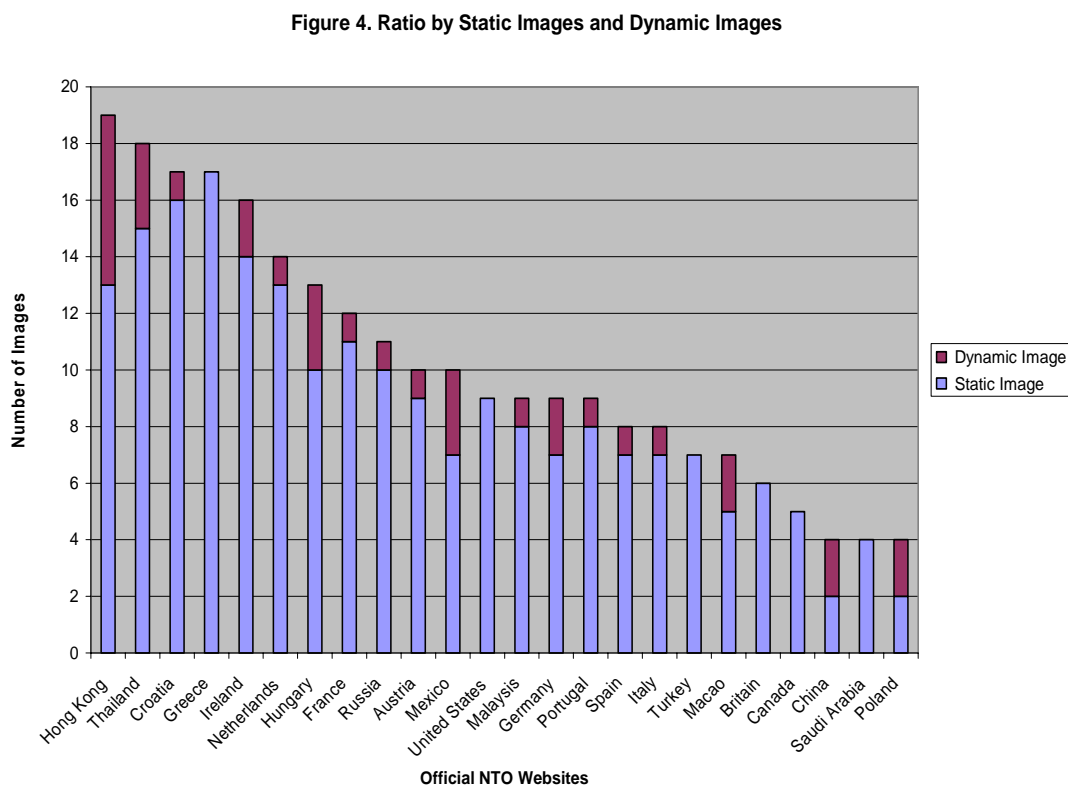
**Table 4.3 Rank by Total Image Counts of World's Top NTO Websites**

<u>Rank</u>	<u>NTO Websites</u>	<u>Static</u>		<u>Dynamic</u>		<u>Total</u>	<u>Rank by Tourist</u>
		<u>Image</u>	<u>%</u>	<u>Image</u>	<u>%</u>		
1	Hong Kong	13	68	6	32	19	7
2	Thailand	15	83	3	17	18	18
3	Croatia	16	94	1	6	17	24
3	Greece	17	100	0	0	17	16
4	Ireland	14	88	2	12	16	25
5	Netherlands	13	93	1	7	14	20
6	Hungary	10	77	3	23	13	17
7	France	11	92	1	8	12	1
8	Russia	10	91	1	9	11	21
9	Austria	9	90	1	10	10	10
9	Mexico	7	70	3	30	10	8
10	United States	9	100	0	0	9	3
10	Malaysia	8	89	1	11	9	13
10	Germany	7	78	2	22	9	9
10	Portugal	8	89	1	11	9	19
11	Spain	7	88	1	12	8	2
11	Italy	7	88	1	12	8	5
12	Turkey	7	100	0	0	7	12
12	Macao	5	71	2	29	7	23
13	United Kingdom	6	100	0	0	6	6
14	Canada	5	100	0	0	5	11
15	China	2	50	2	50	4	4
15	Saudi Arabia	4	100	0	0	4	22
15	Poland	2	50	2	50	4	15

Remark: Ukraine does not have an NTO Website

place. Upon consideration of the ratio between the usage of static images and dynamic images, China and Poland, are the only two countries, which show an even distribution as indicated by figure 4.4.

**Figure 4.4 Ratios by Static Images and Dynamic Images**



In Table 4.4, Hong Kong is listed in the first place in the use of dynamic images, followed by Thailand, Hungary and Mexico. United States, Britain, Canada, Turkey, Greece and Saudi Arabia are the only six countries not having dynamic images in their Websites. As opposed to the usage of dynamic images, Greece, Croatia, Thailand are ranked in the first three places in the use of static images (Table 4.5).

**Table 4.4 Rank by Dynamic Image Counts of World's Top NTO Websites**

Rank	NTO Websites	Dynamic Image
1	Hong Kong	6
2	Thailand	3
2	Hungary	3
2	Mexico	3
3	Ireland	2
3	Poland	2
3	Germany	2
3	China	2
3	Macao	2
4	Russia	1
4	Austria	1
4	Netherlands	1
4	Malaysia	1
4	Portugal	1
4	Spain	1
4	Italy	1
4	Croatia	1
4	France	1
-	United States	0
-	United Kingdom	0
-	Canada	0
-	Turkey	0
-	Greece	0
-	Saudi Arabia	0
	Total	34

Note: Ukraine does not have an NTO Website.

**Table 4.5 Rank by Static Image Counts of World's Top NTO Websites**

<u>Rank</u>	<u>NTO Websites</u>	<u>Static Image</u>
1	Greece	17
2	Croatia	16
3	Thailand	15
3	Ireland	14
4	Hong Kong	13
4	Netherlands	13
5	France	11
6	Hungary	10
6	Russia	10
7	United States	9
7	Austria	9
8	Portugal	8
8	Malaysia	8
9	Germany	7
9	Mexico	7
9	Spain	7
9	Italy	7
9	Turkey	7
10	United Kingdom	6
11	Macao	5
11	Canada	5
12	Saudi Arabia	4
13	China	2
13	Poland	2
	Total	212

Note: Ukraine does not have an NTO Website.

## 4.2 Discussion

The importance of information technology in tourism has increased drastically in recent years and more and more destination marketing organizations have realized that Web marketing is becoming a crucial part of their marketing strategies (Wang, and Fesenmaier, 2003). The results of this study reveal 24 out of 25 world's top destination nations have set up their official Websites, which indicates that Website marketing has a very important role for NTOs to promote their products and to distribute the tourism-related information. Ukraine is the only nation not having an official tourism Website.

It is interesting to note the leading three destination countries, France, Spain and United States, do not have a high rank in terms of the count of total images and image types used. The multi-image elements identified from the 24 official Websites include animation graphic / picture, automated slide show, motion pictures / streaming videos / with audio, still photo / picture and graphic / icon / banner. The results are correspondent with the findings by Coyle, and Thorson (2001) of that rich media developed by image-based technology to improve the vividness of a tourism Website has been increasingly accepted. The element of motion pictures / streaming videos / without audio is not presented in the Websites of world-leading destination countries as expected. Despite their capabilities to employ Information Technology (IT), the results suggest the development of web page design for tourism Websites in overall has not met with expectations. Regardless of a different choice of

design strategy, the numbers of static images of 212 units collected from the studied Websites, accounted for 86 % of total images presented, are way too high if the role of dynamic images should be also considered as an important part of the mix of a quality tourism Website. Six nations including United States, Britain, Canada, Turkey, Greece and Saudi Arabia do not use dynamic image as a part of their image-based technologies to design their official Websites.

Gretzel, Yuan, and Fesenmaier (2000) stated image, page copy, and the structure of site would affect consumer behavior. The content design of the web page is very important for Websites of National Tourism Organizations because they reflect the image of the destination countries. The content is referred to interactivity or vividness. The application of dynamic image employed by countries such as Hong Kong, Thailand, Hungary and Mexico can potentially indicate the level of vividness and attractiveness considering the units of total image elements and the ratio between static images and dynamic images used.

## **CHAPTER 5**

### **5. LIMITATION AND IMPLICATIONS FOR FUTURE RESEARCH**

#### **5.1 Limitation**

This study has several limitations. Because the samples are decided on the basis of the ranks of world's top tourism destinations and the ranking is changed every year, the data collected is only good for one-year use. Also, the rank of Greece in 2004 is decided by its tourist arrivals collected in 2003, which is listed on the table of World's Top Tourism Destinations (2004) provided by World tourism Organization (WTO). Not all selected nations, such as Ukraine, have an official tourism Website. Because of the criteria to select the subject samples based on the number of international arrivals, the nations selected were not well represented geographically. The study of the first page, instead of multiple pages from the selected site, affected the collection of total images used in the site. Timing is another concern, as technology is constantly evolving and the strategy to design a web page is rapidly changing.

This research study has presented the results based on a comparison between the use of static stages and dynamic images by 24 official NTO Websites of the world's top destination countries. The results suggest the use of a Website as a marketing tool to promote services is available to the major destination nations and the technology-based images have



become the main part of web page design. Evidence indicates the use of static images is far greater than the use of dynamic images in this study.

## **5.2 Implications**

The present study could be extended in scope and focus. The range of destination nations studied could be increased to include all destination countries. The collection of the data of page viewers for the subject tourist Websites could help better understand the relationship between the behavior of web users and the use of technology-based images. Although this study cannot be generalized, a review of the most visited destinations' NTO Websites in terms of image-technology content has proven to be useful for understanding the quantity and types of image technologies used and, moreover, the study of the use between static images and dynamic images for will be helpful for the development of future related research focusing on this aspect of web-content analysis.

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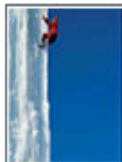
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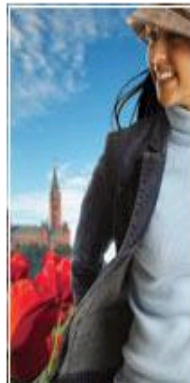
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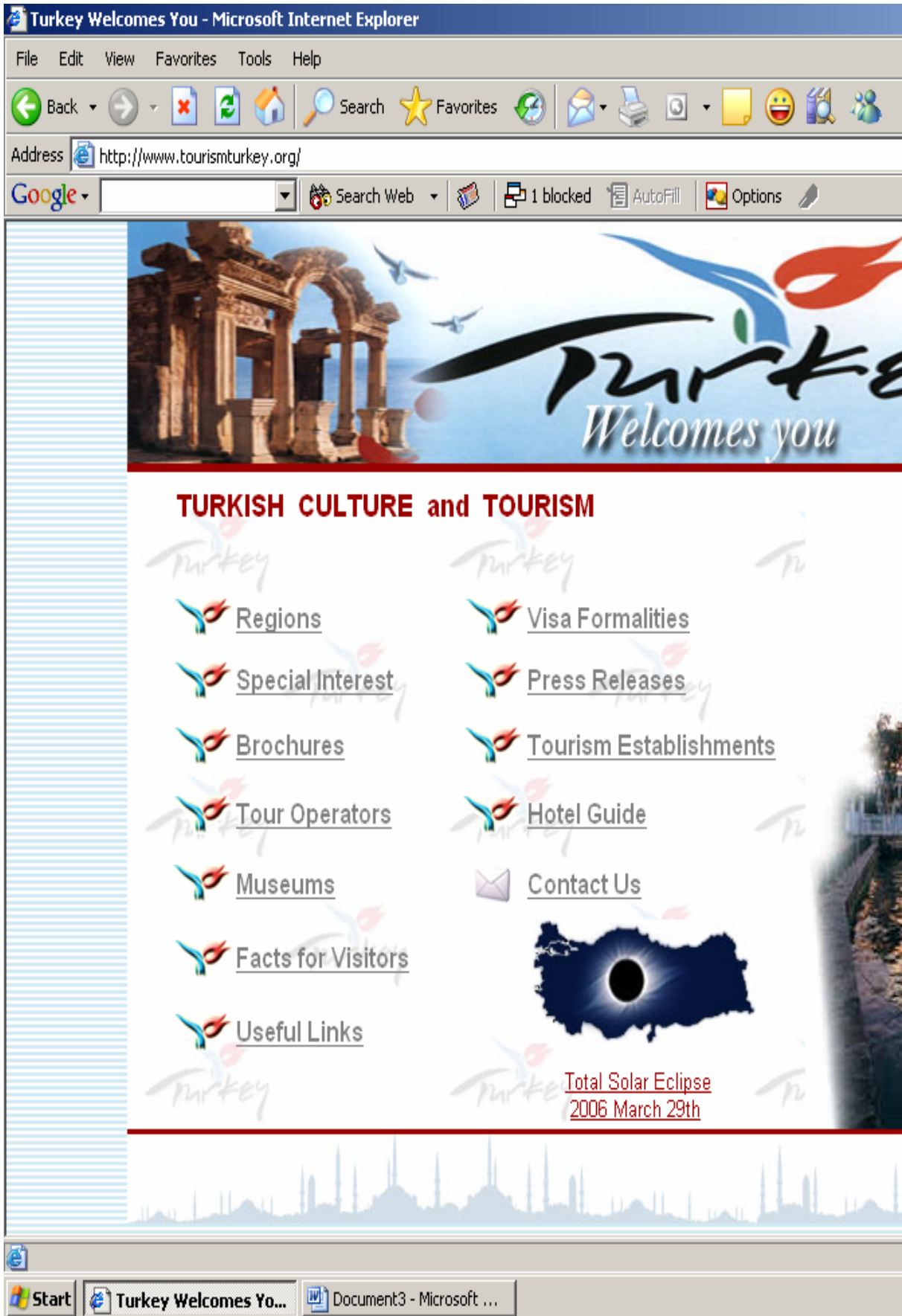
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- ▣ Communications Museum
- ▣ Cinema Sans Frontières
- ▣ Depth of Shadow - Sculptures by Lee, Yong Deok
- ▣ "Impressions of Jiangnan" by Lai
- ▣ Exciting urban activities in Macau
- ▣ 6th Macau Design Biennale
- ▣ 2006 Macau World Heritage Year

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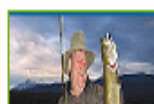
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## **Vita**

Lung-chiuan (Danny) Chiang, born in Taiwan, has a diverse academic background. He owns two Bachelor of Arts degrees; one is in Journalism from Chinese Culture University and another is in Advertising from University of Alabama. He also has two Master of Arts degrees; the first one is in Communication Arts from New York Institute of Technology and the second one is in Asian Studies from St. John's University. Prior to his return to school, he has over 14 years' progressively corporate experiences in the areas of customer service, sales, advertising and marketing communication. He will graduate with a Master of Science in Hospitality and Tourism Management from the University of New Orleans in December 2006.