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Competitive Positioning Analysis of Long-Haul Holiday Destinations by Chinese Travellers

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ABSTRACT

This study analyzes Chinese views of seven destinations in terms of motivational travel activities/experiences for a long-haul holiday trip, likelihood of recommendation of the destinations to others, level of knowledge about holiday opportunities in the destinations, and interest in visiting. Results indicate that Chinese travellers considered “nature” and “culture” related activities such as “seeing beautiful scenery,” “exploring nature with city amenities nearby,” “seeing historical and cultural attractions,” “sampling local flavours,” and “exploring vibrant cities that are in close proximity to nature” when considering taking a long-haul holiday trip. Further, Chinese travellers perceived the seven long-haul destinations as separate and distinct when rating best fit travel activities/experiences to each destination. This suggests that travel destinations, specifically the seven selected long-haul destinations, must be prepared to differentiate their destination’s image and the range of experiences and services to appeal and attract more Chinese travellers.

Keywords: *Chinese perceptions, long-haul holiday destinations, competitiveness, positioning analysis.*

INTRODUCTION

Due to China’s growth in outbound tourism and its huge population that can be tapped for future travel, there are no doubts that China represents an attractive tourism source market with huge potential for many countries. Given the significance of the Chinese outbound market, it is clear that tourism marketers have a strong vested interest in identifying the image, impression, preference, and perception of their destination and its products and services that are important in the minds of Chinese tourists in planning their international short- or long-haul trips (Yun and Joppe 2011).

Generally, destinations are marketed to be a recognized choice, to be competitive, and to increase visitation market share (Baloglu 1997; Woodside 1982). However, promoting a destination has never been an easy task and remains a difficult marketing challenge. Tourism marketers need to know more about the nature of in-destination and out-of-destination visitor characteristics and how actual and potential visitors perceive local destinations. Therefore, the analysis of current or potential travellers’ perceptions or traits helps identify factors contributing to the success or failure of a marketing strategy. Consequently, this allows a destination’s travel planners to improve its product image or attractiveness in the target markets (Crompton, Fakeye, and Lue 1992; Gartner 1989; Milman and Pizam 1995).

This study analyzes Chinese perceptions of seven long-haul holiday destinations in terms of motivational travel activities/experiences for a long-haul holiday trip, likelihood of recommendation of the destinations to others, level of knowledge about holiday opportunities in the destinations, and interest in visiting. The purpose of this study is to explore the competitiveness of long-haul holiday destinations where potential Chinese travellers consider making a holiday trip in the future. In this study, the seven long-haul destinations include Canada, the United States, Australia, France, Germany, the United Kingdom, and New Zealand.

LITERATURE REVIEW

Many factors contribute to how a destination is perceived. According to Decrop (1999), they are highly interrelated with or influenced by a multitude of variables, which are not only extensive and complex but are also not yet known (Mayo and Jarvis 1981). The factors that are known to influence destination perceptions can be divided into three categories: travel stimuli, personal and social determinants of travel behavior, and external variables. Selected papers supporting these findings include Decrop (2006), Mathieson and Wall (1982), Middleton (1988), Moutinho (1987), Reisinger and Mavondo (2005), Reisinger and Turner (2002), Schmoll (1977), Sussmann and Ünel (1999), Um and Crompton (1990), and Woodside and Lysonski (1989).

In tourism studies, perception of a particular destination or multiple destinations has been one of the major research topics in the past few decades because it is a fundamental and critical subject to understand travel behaviour affecting the development of marketing strategies and product delivery. Tourism scholars have extensively examined how holiday destinations are perceived, evaluated, and chosen. These three aspects are in line with the classical distinction between cognitive, affective, and conative consumer responses in decision-making models. In measuring destination perceptions, adaptations have mostly dealt with the attribute perspective, which focuses on the characteristics or features of the destinations that are used to form judgements and decisions (Driscoll, Lawson, and Niven 1994; Joppe and Yun 2013; Goodrich 1977; Kim 1998; Yun and Joppe 2011).

METHODOLOGY

Data

The 2012 China survey of the Global Tourism Watch (GTW) market research program commissioned by the Canadian Tourism Commission (CTC) was used for this study to identify mainland Chinese perceptions of the seven specific long-haul holiday destinations. The GTW program was designed to monitor and report on key market indicators for Canada, track brand performance, and examine Canada's market positioning over time, and across 12 core and emerging markets, in a consistent way (CTC, 2013).

Samples

The target population of the survey was Chinese residents aged 18 years and older, who had taken a long-haul pleasure trip outside of East Asia (China, Taiwan, Hong Kong, Macau, South Korea, and Japan) where they had stayed at least four nights with a minimum of 1 night in paid accommodation in the past three years or who planned to take such a trip in the next two years. Data collection was conducted in four cities (Beijing, Shanghai, Guangzhou, and Shenzhen) and 1,690 samples were collected in July 2012 (Table 1).

Measures

The survey collected a wide range of information regarding Chinese travel behaviours. The primary variables used for this study include 23 items of motivational travel activities and experiences for taking a long-haul holiday trip, likelihood of recommending the destinations to others, level of knowledge about holiday opportunities in the destinations, and interest in visiting the destinations in the next two years. In addition, respondents were asked to select up to three destinations that they feel best fits each of the 23 activity/experience items. These are the key variables to position the selected seven destinations perceived by mainland Chinese long-haul pleasure travellers.

Table 1. Socio-demographic Characteristics of Respondents (Total N = 1,690)

	<i>N</i>	%
City of Residence		
Shanghai	708	41.9
Beijing	495	29.3
Guangzhou	387	22.9
Shenzhen	100	5.9
Gender		
Male	965	57.1
Female	725	42.9
Age		
18-34	858	50.8
35-54	586	34.7
55+	246	14.6
Marital Status		
Married or living with someone	1,283	75.9
Single	379	22.4
Other (separated/divorced/widowed)	23	1.4
Prefer not to answer	5	0.3
Education		
Junior Secondary School/Middle School /Junior High School	6	0.4
Senior Secondary School / Senior High School	53	3.2
Technical / Vocational Training	30	1.8
College	229	13.5
University	1,143	67.7
Post Graduate or above	227	13.4
Prefer not to answer	1	0.1
Employment Status		
Working full-time (30+ hours per week, employed)	1,461	86.5
Working part-time (8 to 29 hours per week, employed)	31	1.8
Working in home/housewife/husband	6	0.4
Retired	82	4.8
Unemployed	2	0.1
Student	76	4.5
Self-employed (full-time or part-time)	29	1.7
Other	2	0.1
Prefer not to answer	1	0.1
Monthly Household Income before Taxes in 2011		
Below 4,000 RMB	36	2.1
4,000 to 5,999 RMB	56	3.3
6,000 to 7,999 RMB	115	6.8
8,000 to 9,999 RMB	175	10.3
10,000 to 14,999 RMB	357	21.1
15,000 to 19,999 RMB	338	20.0
20,000 to 29,999 RMB	342	20.2
30,000 RMB or above	255	15.1
Prefer not to answer	17	1.0

Analysis

Descriptive statistics were generated for all items used in this study to provide characteristics of the sample and offer general information regarding the study variables. One-way ANOVA (Analysis of Variance) tests were run on the three specific variables, including likelihood of recommendation of the destinations to others, level of knowledge about holiday opportunities in the destinations, and interest in visiting the destination in the next two years to determine whether variables differed among the seven destinations.

Regarding the likelihood of recommendation of the destination to others, the Net Promoter Score (NPS) for each of the seven destinations was calculated to gauge the level of loyalty toward the destinations and to compare with the mean scores of the scale used in the survey. NPS is a customer loyalty metric developed by Reichheld (2003). The scoring for the answer is based on a 0 to 10 scale split into the following three groups: Promoters (9 to 10), Passive (7 to 8), and Detractors (0 to 6). The final NPS can simply be calculated by subtracting the percentage of customers who are Detractors from the percentage of customers who are Promoters (Markey, Reichheld, and Dullweber 2009; The Official Net Promoter web site 2015).

Further, multidimensional scaling (MDS) method was performed to produce a spatial perceptual map indicating the locations of multiple destinations and Chinese travellers' perceptions of their attributes (Baloglu and Brinberg 1997; Green, Carmone, and Smith 1989; Kim, Guo, and Agrusa 2005) and correspondence analysis (CA) was conducted to correlate travel activities/experiences of the seven selected destinations on two-dimensional axes (Hoffman and Franke 1986).

FINDINGS

Perceived Importance of Travel Activities/Experiences for a Long-Haul Pleasure Trip

As presented in Table 2, "seeing beautiful scenery ($M=3.38$)," "exploring nature with city amenities nearby ($M=3.33$)," "seeing historical and cultural attractions ($M=3.31$)," "sampling local flavors ($M=3.26$)," and "exploring vibrant cities that are in close proximity to nature ($M=3.15$)" were the five highest rated motivational activities based on the level of importance. The next highest rated activities were "experiencing a country's unique character and local lifestyles ($M=3.13$)," "experiencing aboriginal culture and attractions ($M=3.12$)," "visiting national parks and protected areas ($M=3.05$)," and "city cultural experiences ($M=3.02$)." At the opposite end, Chinese travellers were least likely to be engaged in "participating in culinary learning experiences ($M=2.32$)," "ski and snowboard vacations ($M=2.36$)," and "participating in other winter activities ($M=2.41$)."

Perceptions of Likelihood of Recommendation, Knowledge, and Interest in Visiting

Table 3 shows results of ANOVA tests regarding differences in likelihood of recommendation, destination knowledge, and interest in visiting among seven long-haul destinations. In terms of mean scores and NPS of likelihood of recommendation of the destination to others, while Australia ranked the highest ($M=8.34$; $NPS=41.87\%$), three countries including Germany ($M=7.76$; $NPS=17.0\%$), United Kingdom ($M=7.82$; $NPS=20.86\%$) and Canada ($M=7.83$; $NPS=20.74\%$) were rated as the lowest.

Among the competitive set, Australia ($M=3.47$) and the United States ($M=3.42$) ranked the highest for destination knowledge while Germany was the lowest ($M=3.17$). Australia was the top destination of interest among Chinese travellers ($M=4.02$) compared to other competitive destinations. France placed second ($M=3.94$), followed by the United States ($M=3.82$) and New Zealand ($M=3.80$) in third place. Interest was relatively lower for Germany ($M=3.69$), Canada ($M=3.74$), and the United Kingdom ($M=3.77$).

Table 2. Perceived Importance of Travel Activities/Experiences for a Long-Haul Holiday Trip

	Mean	Std. Deviation	%
Seeing beautiful scenery (e.g., rivers, waterfalls, glaciers, Aurora, landscapes)	3.38	.749	52.7
Exploring nature with city amenities nearby	3.33	.746	48.2
Seeing historical and cultural attractions (e.g., historic buildings, world heritage sites)	3.31	.737	46.6
Sampling local flavours (e.g., restaurants featuring local specialties)	3.26	.761	44.2
Exploring vibrant cities that are in close proximity to nature	3.20	.761	39.9
Experiencing a country's unique character and local lifestyles (e.g., mingling with locals)	3.13	.762	34.9
Experiencing aboriginal culture and attractions	3.12	.766	34.4
Visiting national parks and protected areas	3.05	.798	31.8
City cultural experiences (e.g., museums, galleries, theatre)	3.02	.806	30.5
Observing wildlife in their natural habitats	2.94	.830	28.1
City Activities (e.g., sightseeing, shopping, spa visits)	2.92	.836	27.1
Attending food/wine festivals and events	2.81	.846	22.0
Land-based journeys of one or more nights (e.g., hiking, biking)	2.70	.826	16.8
Multi-day touring on your own by car or train	2.68	.852	17.7
Resort experiences in natural settings (e.g., golf, fishing/hunting, spa/wellness)	2.62	.920	19.3
Multi-day guided tours by bus or train	2.60	.878	15.8
Entertainment experiences (e.g., nightclubs, casinos, shows)	2.56	.906	16.3
Water-based journeys of one or more nights (e.g., kayaking, canoeing)	2.53	.862	14.3
Attending major events (e.g., sports, exhibitions, festivals)	2.52	.849	14.1
Participating in summer activities (e.g., day hikes, cycling, fishing)	2.52	.882	14.2
Participating in other winter activities (e.g., snowmobiling, snowshoeing, dog sledding)	2.41	.909	12.9
Ski and snowboard vacations	2.36	.914	12.4
Participating in culinary learning experiences (e.g., cooking classes, food/wine tours)	2.32	.984	14.2

Note: Mean values based on a 4-point importance measure scale where 1 = never important, 2 = sometimes important, 3 = often important, and 4 = always important; % indicates those who rated "4 (always important)" in each of the activity/experience items.

Table 3. Differences in Recommendation, Knowledge, and Interest in Visiting among Seven Long-Haul Holiday Destinations

	Likely to Recommend the Destinations to Others		Level of Knowledge about Holiday Opportunities in the Destinations	Interest in Visiting the Destinations in the Next Two Years
	Scale Mean ¹⁾	NPS % ²⁾	Scale Mean ³⁾	Scale Mean ⁴⁾
Canada	7.83 ^d	20.74 ^d	3.13 ^{de}	3.74 ^{cd}
United States	7.96 ^c	26.37 ^c	3.42 ^a	3.82 ^c
Australia	8.34 ^a	41.87 ^a	3.47 ^a	4.02 ^a
France	8.17 ^b	34.44 ^b	3.33 ^b	3.94 ^b
Germany	7.76 ^d	17.00 ^d	3.08 ^e	3.69 ^d
United Kingdom	7.82 ^d	20.86 ^d	3.21 ^c	3.77 ^{cd}
New Zealand	7.98 ^c	28.14 ^c	3.17 ^d	3.80 ^c
Total	7.98	27.06	3.26	3.83
F-value	23.446 ^{***}	22.581 ^{***}	36.360 ^{***}	27.784 ^{***}

Note: Total N in each destination = 1,690; ¹⁾ Based on a 10-point Likert type scale (1=not at all likely to 10=extremely likely); ²⁾ NPS denotes "Net Promoter Score" and each destination's NPS was calculated by the percentage of respondents indicating a 'recommend' rating of 9 or 10, minus the percentage of respondents indicating a 'recommend' rating of 1 thru 6; ³⁾ Mean values based on a 5-point Likert type scale (1=poor to 5=excellent); ⁴⁾ Based on a 5-point Likert type scale (1=not at all interested to 5=definitely interested); ^{a, b, c, d, e} indicate the result from the post-hoc multiple comparison tests (^a > ^b > ^c > ^d > ^e); *** *p* < .0001 based on F-values in one-way ANOVA (Analysis of Variance) tests.

Positioning of Seven Long-Haul Holiday Destinations

The MDS method began by calculating the percentage of respondents who selected each of 23 activities/experiences as the best fit for each of destinations (23 pairs: all combinations of the seven destinations) and then proximity matrix (seven destinations' dissimilarity scores by Euclidean distance) was calculated to obtain a two-dimensional configuration for the seven long-haul holiday destinations. A measure of fit widely used in MDS is *stress*, which is the square root of a normalized residual sum of squares (Kruskal and Wish 1986). A stress value of zero or near zero indicates that the goodness of fit is acceptable. As presented in Figure 1, the final stress value was .05. On the basis of Kruskal's (1964) criterion, a stress value of .05 shows "good" or "very good" goodness of fit.

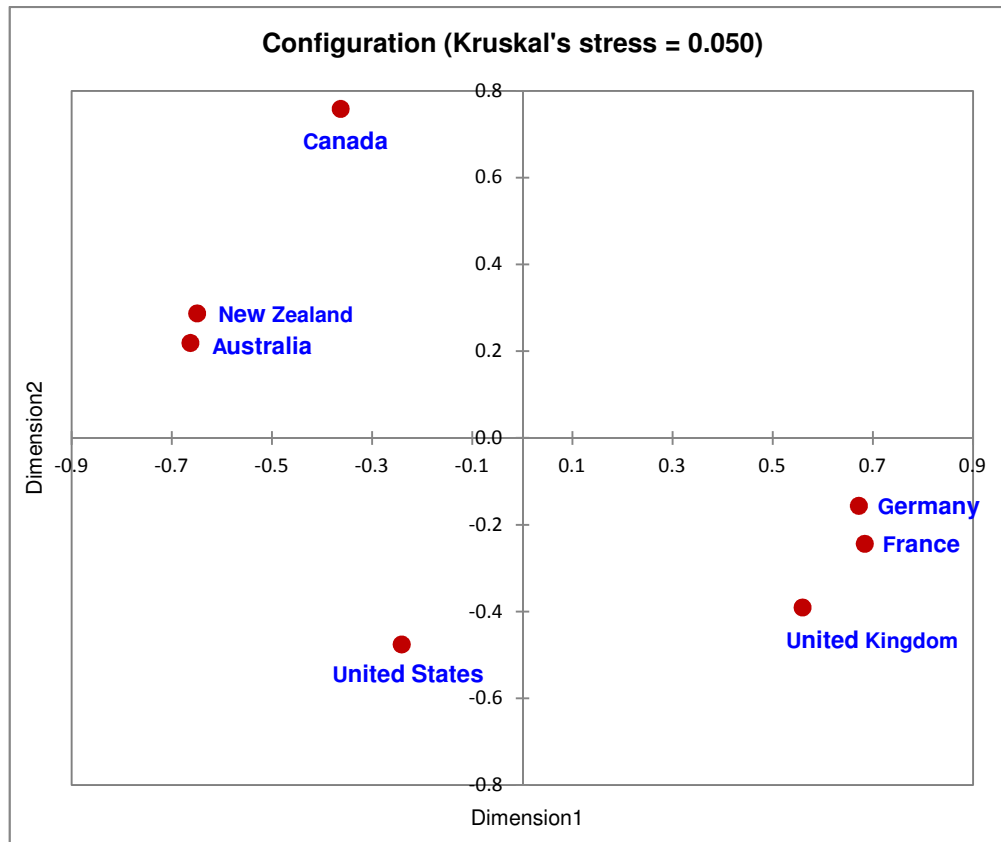
The distances between the destinations in the two-dimensional configurations reflect the levels of similarity or dissimilarity in Chinese perceptions of each destination. Overall, four similar country groups were clustered as the most similar long-haul holiday destinations perceived by Chinese travellers: (1) Canada, (2) New Zealand and Australia, (3) United States, and (4) European countries (Germany, France, and United Kingdom). As Table 4 shows, four pairs, "Australia and New Zealand," "France and Germany," "France and United Kingdom," or "Germany and United Kingdom" were perceived as being quite similar, suggesting that it was difficult for Chinese travellers to differentiate between the destinations within a same pair. Conversely, seven pairs including "Canada and United Kingdom," "Canada and France," "United Kingdom and New Zealand," "France and New Zealand," "Australia and Germany," "Germany and New Zealand," and "Australia and United Kingdom" were perceived as being very dissimilar by Chinese travellers.

Table 4. Dissimilarity, Disparity, and Distance Measures between the Paired Destinations

Pair	Dissimilarity		Disparity		Distance	
	Scores	Rank	Scores	Rank	Scores	Rank
AU - NZ	0.049	1	0.049	1	0.069	1
FR - DE	0.111	2	0.111	2	0.088	2
DE - UK	0.194	3	0.194	3	0.260	4
FR - UK	0.256	4	0.256	4	0.192	3
CA - NZ	0.587	5	0.587	5	0.552	5
CA - AU	0.671	6	0.671	6	0.617	6
US - UK	0.804	7	0.804	7	0.805	7
US - AU	0.864	8	0.864	8	0.813	8
US - FR	0.944	9	0.944	9	0.953	10
US - NZ	0.949	10	0.949	10	0.865	9
US - DE	1.033	11	1.033	11	0.967	11
CA - US	1.102	12	1.102	12	1.240	12
CA - DE	1.370	13	1.370	13	1.381	14
AU - FR	1.371	14	1.371	14	1.424	18
AU - UK	1.372	15	1.372	15	1.366	13
DE - NZ	1.375	16	1.375	16	1.394	17
AU - DE	1.381	17	1.381	17	1.387	16
FR - NZ	1.385	18	1.385	18	1.435	19
UK - NZ	1.388	19	1.388	19	1.386	15
CA - UK	1.485	20	1.485	20	1.473	21
CA - FR	1.533	21	1.533	21	1.449	20

Note: Seven Country Abbreviations are as follows: AU (Australia), CA (Canada), DE (Germany), FR (France), NZ (New Zealand), UK (United Kingdom), and US (United States).

Figure 1
Two-dimensional Configuration for Seven Competitive Long-Haul Holiday Destinations



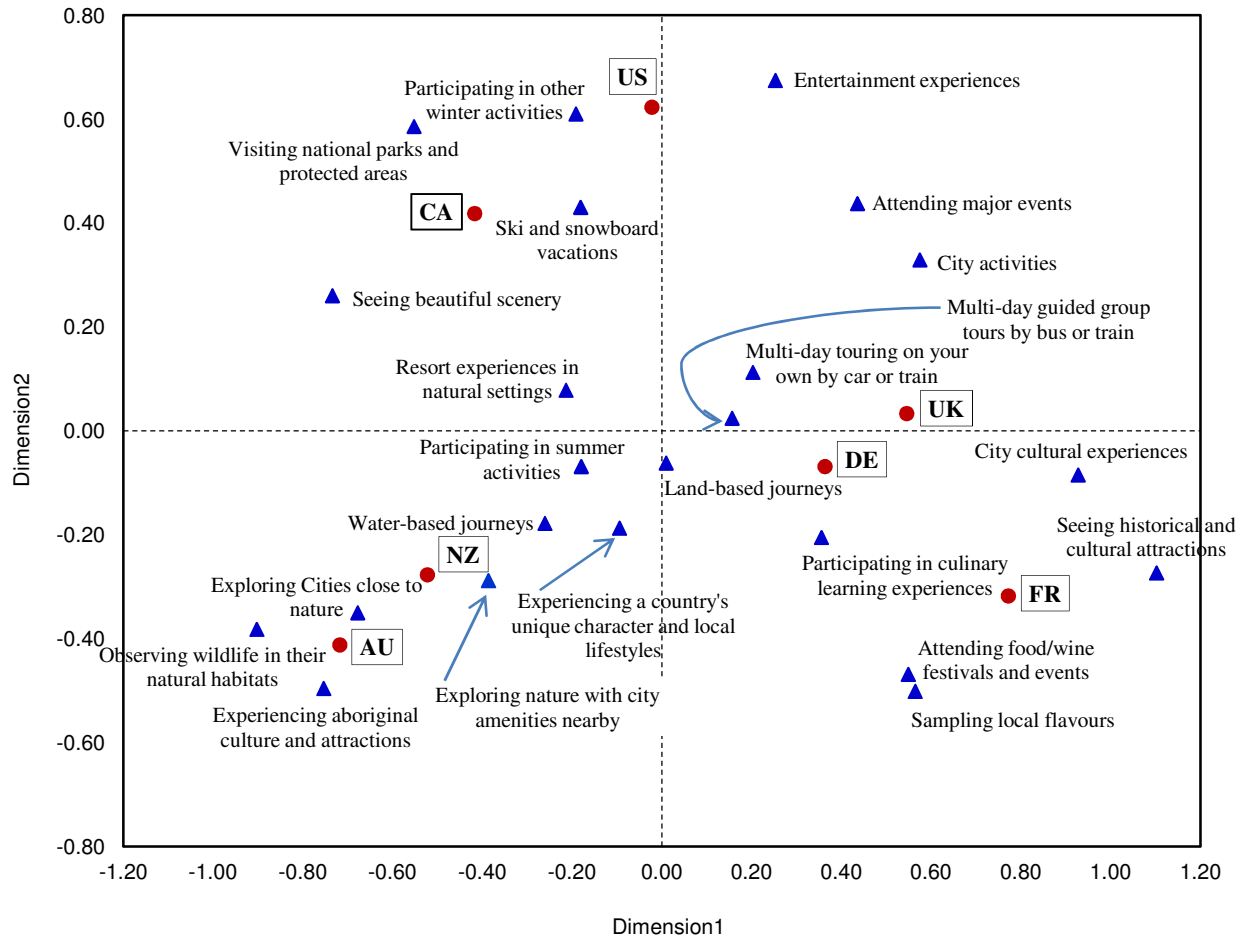
Positioning of Seven Long-Haul Holiday Destinations and Their Best Activity Attributes

The result of the correspondence analysis (CA) provides graphic information with regard to the relationships between the seven selected long-haul destinations (indicated as column variables) and the 23 activities (indicated as row variables). The perceptual positioning map (Figure 2) highlights the relative similarities and differences in the joint space among these destinations and attributes of best fit activities for each one. The proximity between a pair of points of column and row variables was used to interpret the strength of the underlying relationship between them: the closer together the points, the stronger the relationship (Greenacre 1993). With regard to the explained proportion of inertia of CA between the seven destinations and their best activities perceived by Chinese travellers, the first two principal components accounted for 80.8% of the variance, with 66.6% of the variance (singular value=0.284) accounted for by the first dimension and 14.2% of the variance (singular value=0.131) accounted for by the second dimension.

It was found that Canada and the United States were most likely to be perceived by Chinese travellers as the best destination for “ski and snowboard vacations,” “other winter activities,” and “national parks and protected areas.” Chinese travellers were most likely to perceive Australia and New Zealand as the most important destination for “exploring cities close to nature,” “experiencing nature with city amenities nearby,” “observing wildlife in their natural habitats,” “experiencing aboriginal culture and attractions,” “water-based journeys,” and “experiencing a country’s unique character and local lifestyle.” As expected, the three European countries were most likely to be viewed by Chinese travellers as the most preferable destinations for culture-related activities. In detail, the United Kingdom and Germany were most likely to be viewed by Chinese travellers as the most preferable destination for “multi-day touring on your own by car or train,” “multi-day guided group tours by bus or train,” “city activities,” “city cultural experiences,” and “participating in

culinary learning experiences” whereas France was perceived as the most favourable destination for “seeing historical and cultural attractions,” “attending food/wine festivals/events,” and “sampling local flavours.”

Figure 2
Perceptual Map of Seven Long-Haul Holiday Destinations and Their Best Activities/Experiences perceived by Mainland Chinese Travellers



Note: Seven Country Abbreviations are as follows: AU (Australia), CA (Canada), DE (Germany), FR (France), NZ (New Zealand), UK (United Kingdom), and US (United States).

CONCLUSION

This study demonstrated the competitiveness of the destinations perceived by Chinese travellers using ANOVA tests, multidimensional scaling analysis, and correspondence analysis. In this study, Chinese travellers perceived the seven long-haul destinations as separate and distinct when rating best fit travel activities/experiences to each destination. The findings indicate that there are significant differences among potential Chinese travellers’ perceptions toward the long-haul holiday destinations. By incorporating the findings of the study, long-haul holiday destinations where potential Chinese travellers consider making a holiday trip in the future should better position themselves so that increased demand for visitation may be generated to their respective destinations.

Furthermore, the findings have significant implications for destination competitiveness and the type of product development and marketing that should be undertaken. This is an important observation and reaffirms that travel destinations, specifically the seven selected long-haul

destinations, must be prepared to differentiate their image of destinations and their range of experiences and services to appeal and attract more specific markets like China.

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