

A Work Project presented as part of the requirements for the Award of a Master Degree in Management from the NOVA – School of Business and Economics.

**HOW TO ATTRACT MORE YOUNG TOURISTS
TO MADEIRA ISLAND? A CASE STUDY ON THE
BRAND IMAGE OF A TOURISM DESTINATION**

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Abstract

The youth travel segment is experiencing rapid growth which creates socio-economic opportunities for local communities and the overall tourism sector. Although Madeira Island has a long tradition in tourism, it is not yet attracting this segment. The purpose of this Work Project is to analyse the causes contributing to the lack of young tourists visiting Madeira and propose recommendations towards mitigating its effects. To attain this, research was conducted on Madeira's tourism sector, the branding and promotion of the destination as well as on the different images young tourists have of Madeira Island.

Keywords: Madeira Island, Young Tourists, Brand Image, Promotion Strategy

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1. Introduction and Objectives

Madeira Island “is otherworldly and jaw-droppingly beautiful” (Abel, 2019), it has been considered Europe’s and World’s Leading Island Destination for the past four years (WTA, 2019). Said to have “magnificent nature and an adventurous side that is sometimes overlooked” (Abel, 2019), it is claimed that “there’s no reason that this lovely island shouldn’t appeal to younger travellers” (Shurvell, 2019). Having worked for Madeira Promotion Bureau (APM) before, in initiatives that aim to promote the destination, it is clear they too consider Madeira Island has appealing features to be a young tourists' destination. Nevertheless, APM believes Madeira has yet to live up to its full potential when it comes to attracting the millennial generation, more precisely tourists under 35 years old. In fact, looking at Funchal’s airport statistics, during the Summer of 2018 (VMT, 2018) and Winter of 2018/19 (VMT, 2019) only 5% of inbound passengers were aged under 35.

The youth travel segment is increasingly growing and represents 23% of the 1 billion international travellers, each year (UNWTO, 2016). As stated by the former UNWTO Secretary-General, Taleb Rifai, at the opening of the World Youth and Student Travel Conference in 2012, “These young travellers are environmentally-aware and tend to stay longer and interact more closely with the communities they visit than the average tourist.” (quoted in UNWTO, 2012). Hence, the goal of this Work Project is to define adjustments in the promotion and communication strategy of Madeira Island to attract more tourists of the above-mentioned age group. These come as recommendations directed to APM.

For this, it was necessary to do research on the environment surrounding tourism in Madeira. The intrinsic characteristics of the island, its natural resources, the role of tourism in the economy, the tourism institutions and the overall performance in different touristic areas. Moreover, based on interviews with experts, it is examined what APM defines as Madeira’s identity, positioning and how they currently structure the promotion and communication of the

destination. The chosen methodological approach to address the problem in view focuses on one of the key stakeholders of tourism in Madeira: the tourists. “Madeira seems to be the island that has it all. Yet Portugal’s “pearl of the Atlantic” has always had an image problem” (Ames, 2018). Therefore, we explore what are the current perceptions of Madeira for tourists under 35 years old, whether they have or not visited the island. The perceived images of Madeira were then compared to the aspired identity, in order to analyse if they are distant and what are the possible reasons for an existing gap. Furthermore, understand what young tourists’ decision path to pick Madeira as a holidays’ destination is, their booking behaviour and holiday preferences, as well as, find which limitations they found when visiting Madeira.

2. Contextual Background

2.1 The Island

Madeira island is part of Madeira Autonomous Region (RAM), an archipelago constituted by the two inhabited islands Madeira and Porto Santo, as well as the two smaller non-habited subarchipelagos Desertas and Selvagens. It is a Portuguese territory located in the Atlantic Ocean “978 km southwest of Lisbon, about 700 km west of the African coast” (STRC, n.d.).

Madeira is the biggest island and due to its “hilly terrain offers a wide diversity of landscapes” (Madeira Web, n.d.). Additionally, the island is very rich in nature and Madeira’s endemic forest, Laurissilva, was even classified as a World Heritage Site by UNESCO. The climate is mild, temperatures average to 25°C in the Summer and 18°C on the Winter, “one of the advantages of this diversified climate is that it allows nature and sea activities, all year round” (APM, n.d.). Moreover, Madeira has several microclimates, “at one point you may be in a sunbathing suit, and soon thereafter you may reach altitudes above 1800m [...] dressed with a warm coat” (APM, n.d.). Madeira Web, an official guide of Madeira, became a popular website as it live streams webcams spread across the island that allow checking how the weather is in the different locations.

Tourism is a structural sector for Madeira, “currently, [...] is the main driver and the biggest source of revenue of Madeira’s economy” (SRTC, n.d.). It represents about 25% of the GDP of RAM and is responsible for 15% of the regional employment (SRETC, 2016). In 2018, Madeira received more than 1 million visitors (DREM, 2019).

2.2 Tourism Institutions of Madeira Island

On the public sphere, there is a Regional Government ward taking on responsibilities regarding tourism, culture and visitors’ aerial accessibilities to the island, Regional Tourism and Culture Secretariat (SRTC) also known as Madeira Regional Tourism Board. Regional Tourism Directorate (DRT) works under the guidance of SRTC and focus on managing, developing and doing the maintenance of the touristic product of RAM. As a constituting part of the Regional Government, these entities are subject to political constraints and to the government program in place. The head of the SRTC is appointed by the President of RAM’s Government after each election. Regarding private entities, the Madeira Chamber of Commerce and Industry (ACIF-CCIM), represents the interests of companies from different work areas: commerce, services, tourism and industry. Together with the Madeira Regional Tourism Board, at the time, Regional Economics, Tourism and Culture Secretariat (SRETC) they founded the Madeira Promotional Bureau (APM) in 2004. This public-private partnership is a joint effort to promote the destination as a whole. Its associate members are hotels, travel agencies and tourism animation businesses.

2.3 Promotion and Communication of the destination

Initially, when APM was founded, the promotion responsibilities were shared between them and the SRTC. The first targeted the European countries while the second addressed the domestic market and the diversification markets (e.g. USA, Brazil). From 2015 onwards, there was a rearrangement of this distribution of tasks and all promotion efforts were put under APM

in an attempt to unify the message communicated (SRETC, 2016). The goal of APM is both to convince tourists to visit Madeira and to promote the services offered by its associate members. From interviews with the experts working for APM (interview guide available in Appendix A.1), it was possible to understand that APM has a commercial management team composed of a partnership manager and account executives which focuses on business-to-business promotion, for example, among tourism operators, traditional travel agencies and online travel agencies. The promotion targeted directly at consumers is in charge of the marketing team. The communication is done through three main axes: Nature, Sea and Lifestyle. This last one refers mostly to traditions, gastronomy and Funchal. Additionally, APM communicates the events that take place on the island throughout the whole year, which are transversal to the three axes. Additionally, there is a campaign currently in development, Madeira Ocean Trails, specifically focused on activities and events that take place in the trails of the island. It is intended to better convey Madeira's active experiences such as nature and adventure sports. It is relevant to mention that the favourable climate of the island on Autumn and Winter is only implicitly communicated through the name and slogan of the website "Madeira All Year", the event calendar including outdoor sports meetings throughout the whole year and by mainly resorting to pictures in sunny weather.

APM resorts almost exclusively to digital and online tools. It manages the social media profiles of Visit Madeira on Facebook, Instagram and YouTube. Regarding the audience, the age group from 25 to 35 years old is the one with more views in the three platforms, according to the expert from APM responsible for the management of social media. The content on Instagram is mostly reposted from other profiles, visitors and locals. On Facebook, published articles referring to the experience in Madeira are shared, besides the videos and photographs. APM currently uses several distinct websites to communicate about the destination and there is still one other website managed by SRTC, Visit Madeira, which also has institutional content.

Madeira All Year, managed by APM and considered by them the main promotional website, privileges pictures and short promotional paragraphs rather than informative content. It also has a blog section where some topics are further developed. It is currently in review a proposal to incorporate all the different websites in one main website since right now they consider the information to be too disperse and believe it can be sending confusing messages. Another challenge APM shared to face is on tracking the performance of its initiatives in terms of conversion, since this entity does not sell any product or service and is uniquely responsible for the promotion of the destination.

2.4 Tourism Overview of Madeira Island

To peruse the reality of the tourism sector in Madeira it was necessary to assess the product, the distribution, the demand and several other tourism-related factors. The most relevant aspects of the touristic overview of the island are presented in Table 1.

Table 1: Madeira Island Tourism Overview

Product
<p>The island has a diverse variety of activities to offer, leveraging on its inherent characteristics and benefiting from the recent appearance of new recreational businesses. The products on Madeira’s touristic portfolio are complementary between themselves and establish a differentiated offer from other destinations (SRETC, 2016). SRETC classified each product in accordance with the established definitions of the Portuguese Tourism Institute and structured its portfolio in three levels of assets (detailed in Appendix A.2).</p> <p>Tourism-related businesses see their market potential reduced and the increase in tourists’ spending limited as a result of the faulty structure and integration of Madeira’s offer. In addition, the organization of events and animation activities throughout the island also struggle to promote its initiatives and inform the tourists about them. Some touristic products lack support infrastructures, whether related to signalling and information whether to maintenance and capacity. On the other hand, urbanism has a negative impact on the landscape and on nature associated products. (KPMG, 2015)</p>
Distribution
<p>Tourism operators are responsible for a heavy share of the trips to Madeira, 70%, even though there has been surging new ways of booking online. These operators are not completely mindful of the distinctive features of the island as they are not fully aware of the offer, align by other competitors and due to high employee turnover. Instead of providing a bundle of experiences to the tourists, the focus is rather on selling the traditional products. Although the predominance of big tourism operators is expected to prevail, some smaller and niche operators are appearing and enabling the commercialization of certain activities. (KPMG, 2015)</p>

Accessibility

The access to the island is mainly done by aeroplane: 20% of the passengers are flown by low costs, other 20% by charters and the remaining 60% are flown by traditional airlines (KPMG, 2015). Aeroplane occupation rate for Madeira has been increasing, reaching 83% in the first semester of 2016. The total offer of annual aeroplane seats has accompanied this positive evolution, coming to 3.3 million in 2015 (SRETC, 2016). Even so, the offer of direct flights and the diversity of schedules limited, for air connections with tourists' source markets (KPMG, 2015). Nonetheless, the current capacity of Cristiano Ronaldo Madeira International Airport does not constitute a barrier to tourism development (SRETC, 2016). It is estimated to have the capacity to increase annual passenger traffic in at least 40% (KPMG, 2015).

Accommodation

The total number of beds in Madeira was estimated to be 36,612 in 2016, around 16% of the offer are local accommodations and nearly 47% are hotels, as of 2015. They are highly concentrated in Funchal and around 88% of the number of hotel beds are in 4- or 5-star hotels. (SRETC, 2016) Although local accommodation solutions have been increasing, there is still a gap in the available information for this type of offer, as well as of timeshare (KPMG, 2015). To be able to monitor these units and their performance, SRETC created a task force responsible to identify the options available on online platforms and cross this information with the legally registered units (SRETC, 2016).

Demand

The occupation rate has been rising since 2010 reaching 65% in 2015. The number of overnights has increased by 21% between 2010 and 2015, and hotels are responsible for 61% of them. The number of overnights in local accommodation units have been remarkably increasing, registering a 206% growth between 2012 and 2015. (SRETC, 2016) The revenue per available room (Rev-PAR) showed a favourable evolution, especially since 2010. However, the values are still showing the sector has low profitability. During the aforementioned decade, seasonality rate has slightly increased, with demand more concentrated between July and September. Nevertheless, there was an increase of 31.5% in the number of nights during low season, between 2010 and 2015. (KPMG, 2015)

Restaurants, Bars & Cafes

Tourism is of crucial importance for the island's food & beverages demand. Recently, tourists have shown a higher price sensibility and have been increasingly considering booking accommodation packages with meals included. This has resulted in a decrease in demand. The majority of the restaurants show a strong influence of local roots. Traditional gastronomy and regional products are very much appreciated by tourists. Nevertheless, the offer lacks diversity and the options for food intolerances (e.g. lactose) and specific regimes (e.g. vegetarians) are very limited, having a negative impact on tourist satisfaction. (KPMG, 2015)

Human Capital

Most workers of the tourism sector in Madeira have limited specific training and there is a massive struggle to retain qualified labour. This contributes to the unprofessional management of touristic activity from many stakeholders, with the exception of the big groups. The locals, on the contrary, are a valuable touristic asset as they are usually perceived by tourists as welcoming hosts. (KPMG, 2015)

Commerce and Touristic Animation

Local commerce has shown a lack of adaptation to tourism needs, more specifically in terms of the schedule they run in, products and variety. There have been surfacing some establishments with innovative concepts. However, there is still a gap between Madeira's touristic products, mostly connected to nature and sea, and the available offer of touristic animation (e.g. nature and adventure activities, nautical recreation). (KPMG, 2015)

Mobility

In Funchal, as of in the rest of the Island, the available mobility alternatives are limited (e.g. bus, bicycle). (KPMG, 2015).

Source: Authors (2019), based on secondary research (KPMG, 2015), (SRETC, 2016)

2.5 Branding Concepts

This section covers branding concepts used to better analyse the problem addressed by this work project. It is utterly important to understand the Brand Identity and Brand Positioning of Madeira Island as a tourism destination.

According to Jean-Noël Kapferer (2008), “before projecting an image to the public, we must know exactly what we want to project.” The Brand Identity is “what the brand managers would like the brand to be” (Kapferer, 2008), an aspirational concept that should be stable throughout time. Serves as an anchor of meaning and is what makes a brand unique and timeless. It is a crucial concept in brand management since it should guide all decisions related to the brand (Da Silveira, 2018). Moreover, it is of paramount importance that consumers “think about a product or service in the “right” or desired way to maximize potential benefit to the firm,” as stated by Kevin Keller (2013). Brand Positioning “helps guide marketing strategy” with the goal of “finding the proper “location” in the minds of a group of consumers.” Defining it “requires determining a frame of reference (by identifying the target market and the nature of competition) and the optimal points-of-parity and points-of-difference.” (Keller, 2013)

Based on the interviews with experts from the organization responsible for the promotion of the destination and on secondary research, it was possible to lay-down the current Brand Identity and Positioning defined for Madeira.

2.5.1 Brand Identity of Madeira Island

Using a framework designed by Kapferer (2008) to define Madeira Island’s identity, the six facets that constitute the Brand Identity prism are presented in the figure below. The theoretical explanation of this framework can be found in Appendix A.3.

Figure 1: Madeira Island Brand Identity Prism

Physical

- Nature, Sea, Hospitality, Good Climate (temperatures and weather), Diversity, Green, Blue.

Relationship

- Provide tourists a diverse and active experience in terms of landscapes and activities, in close proximity and very connected with nature, for all ages, at any time of the year.

Reflexion

- Active tourist, nature lover, adventurer, desires to explore the island and have a diverse experience.



Personality

- Warm host, Beautiful, Many-sided, Adaptable.

Culture

- Excel in the “art of welcoming”, offer high quality service and ensure a safe visit.

Self-Image

- Active, in harmony with nature, relaxed, fulfilled by a complete experience.

Source: Authors (2019), applying Kapferer’s Brand Identity Model (2008), based on interviews with experts from APM (2019)

The identity of the brand is projected by the SRTC and incorporated on the promotion strategy by APM. Although top management has defined the identity of Madeira Island, not all people involved in the execution of promotion efforts were fully familiar with them. This could be to some extent a consequence of the transitory state APM is currently in. As the executive director of this organization is currently undefined and consequently so is the strategy team, this can be affecting the downstream flow of information. This document could then pose as a useful brand guideline for APM.

2.5.2 Brand Positioning of Madeira Island

Before 2015, the value proposition of Madeira was “Mild weather and Summer Sun in a natural environment” (KPMG, 2015). A repositioning would be suggested, implying a restructuring of the product, as well as its communication, turning the focus towards the tourist experience. The new value proposition adopted from then onwards was “Nature complemented with Culture and Gastronomy” (SRETC, 2016). Applying the Customer-Based Brand Equity model thought by Keller (2013) to Madeira Island’s new value proposition, the several dimensions comprised in the Brand Positioning and the corresponding positioning statement are displayed in Table 2.

Table 2: Current Positioning of Madeira Island (as a tourism destination)

<p><u>Target Buyers</u> – “who the target consumer is”</p>	<p>Combination of geographic, behavioural and psychographic segmentation. Firstly, choose which countries will be targeted based on its economic and demographic indicators, as well as, on the past demand for travelling in general and to Madeira in particular. The countries were classified in categories according to its importance as source markets. The most relevant are: Bet Markets: UK, Germany, France, Portugal Development Markets: Netherlands, Spain, Poland, Denmark, Sweden, Belgium, Finland, Switzerland, Norway, Austria, Italy Afterwards, inside the chosen markets, the focus is on medium- and high-income segments, with travelling experience and that prioritize destinations that ally nature and moderate climate for their travels.</p>	
<p><u>Competitors</u> – “who the main competitors are”</p>	<p>There are two types of competitor destinations considered for Madeira Island: the ones competing for the same distribution channels and the ones that offer a similar product. As previously mentioned, tourism operators are still responsible for a heavy share of tourism demand in Madeira. Thus, at the distribution channel level, it is competing with destinations that, although might offer a different product, are similar in terms of pricing, accessibility. These are competitors vary across time, depending on the commercial strategy defined by tourist operators. Regarding competitors that have a resembling product offer, are highlighted the ones that have a similar value proposition, <i>Nature complemented with Culture and Gastronomy</i>. These are considered the most direct competitors and constitute the frame of reference: Azores, Croatia, Canary Islands, Balearic Islands, Greece and Malta.</p>	
<p><u>Points-of-Parity</u> – “how the brand is similar to these competitors”</p>	<p>Natural resources that invite for nature tourism. Favourable weather for outdoor activities. Proximity to source markets – less than 5 hours of flight. Accessibility from source markets – flight connections. Pricing for medium- and high- income segments. Safety.</p>	
<p><u>Points-of-Difference and Reasons to Believe</u> – “how the brand is different from them”</p>	<p>POD</p>	<p>RTB</p>
	<p>Diversity of experiences and landscapes close to each other.</p>	<p>Proximity of different scenarios, mountains and sea.</p>
	<p>Good climate all year to fully enjoy the destination.</p>	<p>Sunlight and moderate temperature, throughout the whole year.</p>
	<p>Hospitality tradition.</p>	<p>Intrinsic warm hosts that excel in the art of welcoming visitors.</p>
<p>Positioning Statement</p>		
<p>For Europeans with medium- and high-income (Target), Madeira is a nature tourism destination who offers natural resources and favourable weather for outdoor activities, safe, proximal and accessible from source markets (Points of Parity). With the superior quality of service and a hospitality</p>		

tradition, provides a diversity of experiences and landscapes close to each other that can be fully enjoyed all year due to the good climate (**Points of Difference**). Because of the intrinsic warm hosts that excel in the art of welcoming visitors, the proximity of different scenarios such as the mountains and sea, the sunlight and moderate temperature throughout the whole year, Madeira has proven to offer a competitive overall experience on the perception of tourists (**Reasons-to-Believe**).

Source: Authors (2019), applying Keller's CBBE Model (2013), based on secondary research (SRETC, 2016)

3. Addressing the WP topic

3.1 Methodology

The research question was further addressed with primary research focusing on the consumer side, in this case, tourists under 35 years old. Qualitative research techniques of in-depth and semi-structured in-depth interviews are the most adequate to discover ideas and associations, infer about behaviours, as well as, disclose the preferences and feelings of people. They enable to perform topic and frequency analysis. Consequently, were the chosen techniques to discover which are the associations made to Madeira by young tourists and analyse if there are any preference or behaviour patterns on the experience of millennials who travel to the island. The purpose was to assess what is the Brand Image of Madeira for this age group and to understand the entire consumption path of a millennial visitor of Madeira, from the moment they start considering where to go travelling, to the actual enjoyment of the experience itself. Furthermore, find where there is room for improvement, in the opinion of young visitors to Madeira. The sample is composed of 32 individuals with less than 35 years-old since the problem addressed is focused on young tourists. Includes about the same number of non-visitors (Group A) and visitors (Group B), the interview guides prepared are available on Appendix B.1 and Appendix B.2, respectively. As APM targets both the domestic and international markets, around half of the sample is composed of Portuguese individuals and the other half of other nationalities. The pre-recruiting questionnaire used is available in Appendix B.3 and the data regarding the respondents' profiles on Appendix B.4. and Appendix B.5, for Group A and Group B, respectively.

Table 3 describes how the research techniques will be specifically applied to the problem in study and which are the objectives to be attained with each.

Table 3: WP Methodology

<p>Filters:</p> <ul style="list-style-type: none"> • 100% <35 years • 50% Portuguese, 50% Other Nationalities 	<p>Group A: Young tourists who have never visited Madeira No. of interviews = 15</p>	<p>Semi-structured in-depth interviews were conducted with people under 35 years old, of diverse nationalities, that have travelled independently (i.e. without their families) for leisure purposes. This would include travelling with friends, colleagues, teammates, companion or spouse. The main purpose is to disclose the perceptions of Madeira by non-visitors, what they associate to the destination and what kind of experiences would they expect to live there, which contributes to a more complete the assessment of the Brand Image. Additionally, explore young tourists' motivations for travelling, what are the main factors behind the final destination selection and how is their booking and planning behaviour,</p>
	<p>Group B: Young tourists who have visited Madeira No. of interviews = 17</p>	<p>In-depth interviews were conducted with people under 35 years, of diverse nationalities, that have already visited Madeira, for leisure purposes. The objectives are to research what makes them travel there, which other destinations do they consider, which touristic products in the island are of more interest to millennials, dive into the emotions and likes of a young tourist visiting Madeira, disclosure what experiences they lived there and which comparisons do they make to other destinations. Moreover, find which are the most salient limitations travellers of this age group come up with when enjoying holidays in Madeira. Additionally, better understand the Brand Image as we will be able to observe what are the strongest associations they make to Madeira, both before and after having been there.</p>

Source: Authors (2019)

3.2 Research Limitations

The primary research sample could be larger and more diverse. Firstly, foreign interviewees were mainly recruited within Nova SBE environment. Hence, several of them have visited Madeira while living in Portugal. Although a possible source of bias, this enabled to better understand the reason why Portuguese strongly perceive Madeira as an expensive destination to fly to, since many foreigners faced the same bounds (Lisbon-Madeira-Lisbon) and did not have the same perception. Secondly, all Portuguese tourists who travelled to Madeira were visiting locals, which could have led to an overestimation of the importance of locals in the experience of the destination. Thirdly, all interviewees had at least a bachelor's degree. A high education level is usually associated with the medium and high-income segments. Despite

posing a plausible bias, it allowed studying in more detail the target defined for Madeira Island by Madeira Regional Tourism Board (SRETC, 2016).

Finally, a possible extension of this study would be to improve the attribution model used to analyse the performance of promotional campaigns run by APM. Besides awareness and engagement, the ultimate goal of APM is to convert tourists, both to visit the island and to purchase services from its associates. As APM does not sell any service directly, conversion takes place outside their platforms. It would be interesting to conduct research within APM's associate members, with the purpose of exploring how digital tools could be integrated for APM to be able to track conversion metrics of its initiatives.

4. Research Insights

To attain the objectives of this WP, it was important to analyse the experience of young tourists who visited the island and assess the Brand Image of Madeira as a tourism destination, both for the millennials who visited and who did not visit the island.

4.1 Experience in Madeira

Focusing on young tourists who have visited Madeira, it was possible to detect differences between the experiences of Portuguese and foreigners. The main characteristics of the trip and the consideration sets Madeira is inserted in showed to be distinct for the two groups. Therefore, the brand insights are explained separately for each.

Portuguese millennial tourists showed not to consider Madeira for holidays in occasions it could be inserted in their considerations set. The experience on the destination was found very active, connected to both nature and sea and strongly influenced by the presence of a local. The major limitations encountered regard to lack of information available to fully enjoy all the experiences. These insights on the experience of young Portuguese tourists with the brand are presented in more detail in Table 4.

Table 4: Brand Insights from Portuguese tourists

Portuguese
A. Madeira is only considered for holidays in limited circumstances.
<p>Domestic holidays. - Only contemplate Madeira alongside other Portuguese destinations, such as Azores, Algarve or Oporto. They are mainly looking to explore their own country and are also attracted by the idea of being on an island. It is strongly associated with being surrounded by water and having some contact with nature, having in mind this frame of reference (i.e. domestic destinations).</p>
<p>Spring or Summer seasons. - This is connected to their perception of how the weather is in Madeira at each season of the year. The preference for visiting on Spring and Summer is due to the association of enjoying favourable weather for outdoor experiences taking place on the island, <i>“You can only fully enjoy Madeira with good weather [...] the best part of the experience takes place on the outdoors.”</i> (Portuguese, Female, Visited). The least favourite time to visit is from November to February, <i>“I know Madeira has a better climate than Lisbon, but I still wouldn’t go on the peak of the Winter.”</i> (Portuguese, Female, Visited), <i>“I wouldn’t be able to enjoy as much if it was raining, would have to stick to a road trip.”</i> (Portuguese, Male, Visited).</p>
<p>Visiting a local. - Special preference is given to the month of August. Firstly, it is the time of the year when many locals currently living outside the island go to spend their holidays, <i>“I wanted to go to Madeira when my friends would there, that happens mainly in August.”</i> (Portuguese, Male, Visited). Secondly, it is when the biggest local popular festivities take place in small villages across the island, <i>“My friends from Madeira (“madeirenses”) are always talking about the local popular festivities (“arraiais”). I wanted to experience it myself.”</i> (Portuguese, Female, Visited). Contributes to perpetuate the misperception on the weather during Autumn and Winter.</p>
<p>Expensive to get to Madeira relatively to the consideration set and worsened by the preference for high season. - Flights to Madeira are perceived as expensive, both when comparing with the price to visit domestic destinations (even if flying) and with international bounds within Europe, <i>“The flight was super expensive, it’s cheaper for the Azores. Or even for Barcelona or London, it’s stupid.”</i> (Portuguese, Male, Visited). They all stress out the importance of booking the flight with some time in advance (from 3 to 6 months), <i>“I had to book my flight for August in March.”</i> (Portuguese, Female, Visited), <i>“To tell you the truth, my local friend did it for me before it got too expensive.”</i> (Portuguese, Male, Visited).</p>
B. Madeira provides a versatile and active experience, in nature and sea.
<p>Diversity of experiences, spend most of the time outside Funchal. - Spend about a third of the time in Funchal. The rest is spent exploring all over the island. Thus, having a car is considered a must, <i>“I didn’t want to stick to Funchal otherwise I’d miss most of the experience. [...] Having a car was utterly indispensable.”</i> (Portuguese, Female, Visited).</p> <p>Many different activities: discovering the seaside, the steep mountains and doing hikes in the traditional trails of Madeira (“Levadas”). <i>“I didn’t feel like a mere spectator, I felt embraced by nature.”</i> (Portuguese, Female, Visited), <i>“Swimming on the ocean there is special. The water is crystal clear and is at a very good temperature.”</i> (Portuguese, Female, Visited), <i>“When you’re there you don’t want just to swim. [...] want to dive from the rocks, to use glasses to see underwater.”</i> (Portuguese, Female, Visited).</p> <p>Complemented with sightseeing in the city and through viewpoints. Local food is very complimented, as well as, a traditional alcoholic drink “Poncha”, <i>“I loved the typical food. If I stayed there longer, I would have come back with two extra kilos.”</i> (Portuguese, Female, Visited). On the entertainment/night scene, the local popular festivities are often mentioned as the biggest highlight of the island, while some also talk about easy-going drinks in Funchal downtown and old town.</p>

Variety of natural landscapes in close proximity. - Intrinsic characteristics of the island made it possible to enjoy very unique experiences. *“It was breath-taking, seeing the sunrise above the clouds [...], enjoying that natural spectacle at such a high altitude.”* (Portuguese, Female, Visited), *“I had never done a picnic above the clouds. [...] On top of all of that we could still see the sea. It was a life-time experience for me.”* (Portuguese, Male, Visited). Everyone revealed there is a call for taking eye-catching photographs, *“The whole island is very “instagrammable”.*” (Portuguese, Male, Visited). The presence of different scenarios within nature is highlighted, *“The constant dichotomy of the sea and very high mountains.”* (Portuguese, Male, Visited). No need to relocate (in terms of accommodation) in order to get to know the island, *“We can totally sleep in Funchal every night and move around the island during the day.”* (Portuguese, Male, Visited).

The adaptability of the island allows for flexible planning. - Enjoyed being able to choose the type of experience they wish to have each day, depending on their mood. Could pick the suitable geographic area of the island based on the weather conditions, which they check using available outdoor webcams. *“If we felt like relaxing, we would look for a nice spot by the sea [...]. If we wanted something more active, we would drive to the mountains and explore, do trails (“Levadas”).”* (Portuguese, Female, Visited), *“It’s amazing how the weather is so different from place to place in Madeira. [...] We could almost always find a place where the sun is shining.”* (Portuguese, Male, Visited).

Compared the experience in Madeira to ones in amazing tourism destinations. - Mainly due to the landscapes, the environment and the experiences it offers, Madeira was compared to other incredible destinations like Southeast Asia countries, New Zealand, Sri Lanka, Mexico, Croatia, Slovenia, *“It reminded me a lot of New Zealand, the deep nature, the valleys of the mountains.”* (Portuguese, Female, Visited), *“The seaside is very similar to Croatia, I loved it.”* (Portuguese, Male, Visited).

C. Lack of promotion and informational content regarding activities, services and locations.

Unaware of many activities of interest taking place on the island. - Unaware of the existence on the island of activities they said to be interested in when talking about other travels. These are mainly sports of several types: nautical, adventure and nature. Even when already on Madeira, they do not notice any promotion of these, unlike in other destinations with this kind of experiences. The only nature sport most of them were aware of was trailing in the traditional “Levadas”, *“I think Madeira also has the conditions for it (adventure sports) but there is nothing like that there, is there?”* (Portuguese, Male, Visited), *“New Zealand is like the capital of adventure sports [...] and there’s not a chance you would miss it, these experiences are advertised everywhere.”* (Portuguese, Female, Visited).

Difficult accessibility to some spots. - Includes hardships when tracking the spot, lack of signalling and indications. Usually, try to map their itinerary before leaving home so as to cover all the interesting places on their path. This task is difficulted by many spots not being identified on online maps, *“We had difficulties locating some places she wanted to show me. It usually is her family members who take her there and we couldn’t find the spots on Google Maps.”* (Portuguese, Male, Visited). Although they enjoy spending time far from crowded places, they wish some of those places could be more divulged, *“It was awesome that I got to visit a place like that, it’s a pity most of the people miss it.”* (Portuguese, Male, Visited). Could not find any practical guides and tips available, especially important when navigating yourself through nature. They mention previous experiences in other destinations when doing nature tourism and they usually find this kind of guidelines online in blogs and magazines, *“In Sri Lanka, there were*

many places where we couldn't guide ourselves with a GPS and we relied on specific instructions we could find online, using visual references [...]" (Portuguese, Female, Visited).

Moreover, often the access itself is intimidating for some. Several experiences require driving on difficult roads, next to high edges, *"I wouldn't feel comfortable driving myself to Pico do Arieiro at five in the morning, full night, in roads sided by abysms."* (Portuguese, Male, Visited). Thus, a few perceive there is lack of mobility alternatives to experience the island to the fullest.

D. High importance of the locals in the experience

Visiting local friends was the strongest decision factor pointed out for travelling to Madeira. Besides the obvious advantage of having a place to stay, having a local as a personal guide is very appreciated, *"The best thing is having someone from there to show me the best spots."* (Portuguese, Female, Visited). They wish to get the experiences of a local, are curious to see and live what they have been hearing about, *"I was curious to see the places where my friends grew up [...] the places where they tell stories about."* (Portuguese, Male, Visited). Therefore, the choice of locations and activities is in charge of local friends, *"Didn't really want to think about it [...] they certainly know better than me and (I) much rather be surprised."* (Portuguese, Male, Visited).

Feel they had a unique experience for having visited with a local, got to see the true side of Madeira, *"Some of the best places we visited, I would have never heard of them if I wasn't with a local."* (Portuguese, Male, Visited), *"Madeira is one of those places that you have to get to know with a local."* (Portuguese, Female, Visited). Furthermore, it is highlighted that locals help mitigate accessibility problems mentioned above, *"Sometimes she couldn't find the place herself, we were lucky her father is very familiar with the place and gave us some directions."* (Portuguese, Male, Visited), *"We were very lucky! A local fire-fighter offered to take us up to Pico do Arieiro to watch the sunrise."* (Portuguese, Female, Visited). In accordance, the local population is perceived as very warm and helpful, used to interact with tourists.

Source: Authors (2019), based on primary research

Foreign millennial tourists seem to include Madeira more frequently in the consideration set of holidays' destinations. Madeira was found to offer several experiences in nature and in Funchal, with the ocean always nearby, and the locals are regarded as an important complement to the visit. It was not always possible to find information about nor to book activities online. In Table 5 are further described the insights regarding the experience of young foreign tourists in Madeira.

Table 5: Brand Insights from foreign tourists

Foreigners
A. Madeira is inserted in a set of holidays' destinations that is frequently considered.
Nature destination. - Madeira is considered for trips to nature destinations, alongside destinations in Asia and South America countries, <i>"We were thinking of travelling to a place full of nature. We considered going to Asia but then we found out we had that type of offer in Madeira."</i> (Dutch, Male, Visited).
Enjoyable throughout the whole year. - Good climate and sunny (light) all year make it possible to enjoy the experience of Madeira on every season: <i>"I'll be back there in November with friends."</i>

Now I know that the temperatures are usually above 20 degrees [...] and it feels hotter than that." (Italian, Male, Visited).

Proximity and Affordability. - The proximity to the European mainland and consequently, having in mind the frame of reference, the cheaper flights are positive factors, *"Having such nature rich destination so close, without having to spend several hours on an aeroplane."* (Austrian, Female, Visited), *"It was cheap, considering we would pay about 800 to go to Asia or South America."* (German, Female, Visited).

Moreover, the prices of accommodation and restaurants are perceived as very affordable, *"Great location, great house, great price."* (English, Male, Visited).

While studying in Portugal. - Foreigners studying in Portugal take advantage of the time living there to explore the country, *"Might as well get to know the islands while I'm studying here."* (Dutch, Male, Visited).

B. Madeira offers many activities, both in nature and in the city, complemented with the seaside.

Funchal exceeded the expectations in the experiences available. - Spend about three-quarters of the time in Funchal. Surprised by the number of experiences in such a small city, *"There's so much to see and do in Funchal. I wasn't expecting it, especially having visited small cities before."* (Dutch, Female, Visited), *"We spent a lot of time exploring the old town of Funchal, the area of Lido and riding through several viewpoints with a view over the city centre. It was nice having the sea always close by."* (English, Male, Visited). The restaurants generate positive comments, even for the one who showed not to be aware of the typical gastronomy of Madeira, *"I don't really know what's typical there, but the food was so good! Particularly, quality/price-wise."* (German, Male, Visited). The old town of Funchal is the preferred spot for enjoying a relaxed drink by night, *"We went for some drinks a couple of nights. Nice environment, very chilled."* (French, Female, Visited).

High variety of landscapes spread through the island. - Enjoyed having different natural scenarios in a single island, *"[...] black sand beaches, the mountains covered in green entering the blue sea."* (Russian, Female, Visited), *"Very forest-like in some places [...], very rocky and brown in others."* (Dutch, Male, Visited). The diversity is such that even not having visited the whole island the perception is that they have seen a lot, *"We were all over the place, [...] the high mountains, the seaside on the north coast."* (Italian, Male, Visited). The beauty of the landscapes is complemented and all refer to the photographs taken, *"The views were amazing. [...] I took so many incredible pictures, some of them I can't even believe I took myself."* (Spanish, Male, Visited).

Booking of activities and renting a car. - Book one day or half-day tours, to explore other parts of the island. Includes boat trips, jeep tours on the mountains and canyoning experiences, *"We were looking to enjoy the sunny weather on the sea and swim on beautiful bays."* (German, Female, Visited), *"We didn't rent a car, so this [jeep tour] was a way to get mobility around the island."* (French, Female, Visited). Renting a car is often considered when travelling in a group of friends, *"When I went with my girlfriend, we didn't rent but this time with friends we are thinking about it."* (Dutch, Male, Visited).

C. Lack of promotion and informational content regarding activities and services.

Lack of information regarding activities of interest. - Even when it came to activities, they are aware of existing on the island, it was not always possible to find information about those, nor book them online, *"I was looking to go on a fast boat to watch whales and dolphins. I had to go to the Marine to book it and, even so, ended up in a catamaran, only seeing the animals once from far away."* (Italian, Male, Visited).

Unaware of many experiences taking place on the island. - Unaware of the availability of experiences they said to be interested in when talking about other destinations. The only nature sport

mentioned was trailing (in “Levadas”), *“I love doing adventure sports on nature and sea. I reckon Madeira could have something like that.”* (German, Male, Visited), *“I like snorkelling, even have a special mask, wasn’t planning on taking it to Madeira. It doesn’t have conditions for snorkelling, does it?”* (English, Male, Visited).

D. Experience enhanced by the receptivity and expertise of locals.

The local population is very praised for being natural hosts, *“Everyone is so welcoming around there.”* (Dutch, Female, Visited), *“They are very proud of their island and are happy to show it off to you.”* (Austrian, Female, Visited).

Moreover, the guides’ expert knowledge on the island, of the booked tours, was highlighted as adding value to the experience, *“He was a local who has been working as a guide for more than twenty years. It was impressive how much he knew about the landscape.”* (French, Female, Visited), *“I loved hearing about the water cycle in Madeira. I’m very interested in sustainability and the guide knew a lot about it.”* (Dutch, Male, Visited).

Source: Authors (2019), based on primary research

4.2 Brand Image of Madeira Island

Brand Image is the “consumers’ perceptions about a brand, as reflected by the brand associations held in consumer memory” (Keller, 2013). The tourists’ preferences, perceptions, associations and experiences with a destination influence the way it is seen by them. In the case of Madeira, it was noticeable that visiting the island changes the idea millennial tourists have on the destination. Consequently, the Brand Image of Madeira was assessed for young tourists in three situations: having never visited Madeira, prior to having visited Madeira and following having visited Madeira.

The perception of the experience on the island for millennials who have never been there and the associations they make to Madeira, although having similarities between Portuguese and foreigners, there are certain characteristics specific to each of them. Table 6 describes the Brand Image for young tourists that have never visited the island, identifying which aspects are common to all of them and which are dependent on being a domestic or non-domestic tourist.

Table 6: Brand Image having never visited Madeira

Never visited Madeira	
Only Portuguese	- 3 in 8 Portuguese considered the Azores a more attractive destination: <i>“If I were to go to one of the islands it would be the Azores for sure.”</i> (Portuguese, Male, Not Visited). - The Azores is cheaper.
Common	- Very calm and not much to do: <i>“[...] not much going on there, is it? [...] wouldn’t be a priority right now.”</i> (Bulgarian, Female, Not Visited).

	<ul style="list-style-type: none"> - Beach and resort destination: <i>“It’s not my ideal holidays [...] laying down on the beach or by the pool most of the time.”</i> (Portuguese, Male, Not Visited). - Senior destination as mostly are older people who talk about going and having been to Madeira: <i>“[...] it’s mostly parents or grandparents of my friends who talk about it.”</i> (English, Male, Not Visited). - Bus tourism and overcrowded sights: <i>“I imagine buses of tourists everywhere [...]”</i> (Portuguese, Female, Never Visited). - Misperception of the overall landscape: lots of hotels, luxury resorts, not an urban destination but limited presence of nature: <i>“Main road close to the sea, sided by hotels, bars and restaurants.”</i> (Portuguese, Female, Never Visited). - No mention of the climate.
Only Foreigners	<ul style="list-style-type: none"> - 2 in 8 foreigners were unaware of its geographic location and proximity to the European mainland: <i>“It’s probably too far for cheap flights. It’s what? Three, four hours from Lisbon?”</i> (German, Male, Not Visited). - 1 in 8 foreigners had difficulties distinguishing between Madeira and other islands (Canarias, Azores and Balearic).

Source: Authors (2019), based on primary research

Millennials that have visited Madeira often mention the perceptions and associations held when they had not yet visited the destination while describing their experience on the island. The Brand Image for young tourists prior having visited Madeira, presented in Table 7, showed to be almost totally common for Portuguese and foreigners, with exception of the perception that the Azores is cheaper, which is particular for the Portuguese.

Table 7: Brand Image prior to having visited Madeira

Prior to visiting Madeira	
Only Portuguese	<ul style="list-style-type: none"> - The Azores is cheaper.
Common	<ul style="list-style-type: none"> - Calm but with a couple of things to do and places to see. - Bus tourism and concentration of tourists in some sights: <i>“I was expecting to see a lot more people [...] tourist buses driving all over the place.”</i> (German, Female, Visited). - Beach and resort destination: <i>“I thought I would spend a lot more time laying down on the sun, next to the sea.”</i> (French, Female, Visited). - Senior destination as an association to the previous two points plus being a destination older generation talks about <i>“My parents and their friends love going to Madeira, but I never imagined I would love it as well.”</i> (Portuguese, Female, Visited) - Misperception of the overall landscape - plainer, lots of hotels, only some presence of nature: <i>“Actually I imagined the whole island similar to the downtown of Funchal. [...] more like Vilamoura.”</i> (Portuguese, Male, Visited).

Source: Authors (2019), based on primary research

Finally, the assessment is complete with the perceptions of Madeira when having already visited the destination. The Brand Image for young tourists following having visited the island, laid

down in Table 8, shows Portuguese and foreigners share most of the opinions regarding Madeira, despite the divergent ideas on the climate during Winter and Autumn, as well as on the highlighted attribute of the meals on the destination.

Table 8: Brand Image following having visited Madeira

Following visiting Madeira	
Only Portuguese	<ul style="list-style-type: none"> - Good temperatures all year and better weather than in the mainland but still more suited for the Spring and Summer. - Delicious traditional local food.
Common	<ul style="list-style-type: none"> - Diverse and very active experience: <i>“There is so much to see and do, I was very surprised.”</i> (Dutch, Female, Visited). - The climate is a very positive aspect of the stay. - Not a beach destination neither a resort experience: <i>“It’s not really a place to lay down all day, at the beach or by the swimming pool.”</i> (Portuguese, Female, Visited). - Relaxed state-of-mind: <i>“Physically active and psychologically relaxing.”</i> (Portuguese, Male, Visited). - Nature rich destination with amazing landscapes in different scenarios – high altitude mountains and seaside, dry brownish rock cliffs and green dense humid forest. - No sensation of over-tourism – many remote places. - The locals make a positive contribution to the experience. - Exceeded the expectations. - A good destination to travel with friends or their partner. - Better combination than the Azores: <i>“Madeira has a better combination (than the Azores). More charismatic, more things to do, more fun... and has nature too. It definitely scored high on my ranks.”</i> (Portuguese, Female, Visited); <i>“I’m going back with friends next month. Didn’t even consider the Azores.”</i> (German, Male, Visited).
Only Foreigners	<ul style="list-style-type: none"> - 2 in 8 foreigners were unaware of its geographic location and proximity to the European mainland: <i>“It’s probably too far for cheap flights. It’s what? Three, four hours from Lisbon?”</i> (German, Male, Not Visited). - 1 in 8 foreigners had difficulties distinguishing between Madeira and other islands (Canarias, Azores and Balearic).

Source: Authors (2019), based on primary research

A word-cloud with visitors’ strongest associations to Madeira is available in Appendix C.1.

5. Analysis of the Brand Image of Madeira Island

Scanning the different perceptions of millennials on Madeira island, we notice that the idea young tourists had about Madeira before going there is very similar to what the ones who never visited imagine. Apart from being slightly more positive for the ones who ended up travelling to Madeira, the only considerable difference between the two points of views is regarding climate perceptions. While the ones who have never visited very rarely mention the climate

when talking about Madeira, the ones who visited always make references to what they expected it to be like when explaining how their perception changed after visiting. Although they had a notion that Madeira enjoyed mild temperatures, they were not expecting to find such sunny weather nor that it would be significantly better than in Lisbon. As for millennials who have visited Madeira, the overall image for Portuguese and foreigners is identical, only significantly diverging on the climate perceptions too. The major differences are found between the Brand Image for young tourists having visited Madeira and the Brand Image for young tourists not having visited the island, the latter including both having never visited and prior to having visited.

Consequently, two comparative analysis with the Brand Identity were performed, one with the Brand Image not having visited Madeira and another one with the Brand Image having visited Madeira. Table 9 puts side by side the identity and images, becoming clear that the Brand Image after visiting Madeira is very close to the Brand Identity, while it is possible to distinguish many differences between the latter mentioned and the Brand Image before visiting Madeira. Thus, on one hand, the Brand Identity is adequately defined and on the other, there is a gap between the Brand Identity and the Brand Image before going to Madeira. This indicates that the millennial tourists aware of the potential of this destination are mostly the ones who have visited the island.

Table 9: Comparative analysis between Brand Image and Brand Identity

Brand Image Not Having Visited Madeira	Brand Identity	Brand Image Having Visited Madeira
Few things to do, mainly a beach destination to lay-down all day.	Active tourism destination, a whole island to be explored providing a diverse experience that should leave the feeling of complete fulfilment.	Diverse and very active experience. Definitely not a beach destination, nor a resort experience.
High presence of hotels and resorts on the landscape, proximity to the sea, plain surface and some small hills, a	A destination for nature lovers due to its variety of natural landscapes (nature and sea), inviting for an experience in harmony with nature.	Nature rich landscapes in different scenarios: mountains and seaside, dry and humid.

vague notion of the presence of nature.				
Senior destination, prone to “bus tourism”.	Many-sided and adaptable destination. It can provide an active experience within nature both for older and younger generations, leveraging on the many activities and scenarios available on the island.	Exceeded the expectations, it is a good destination to travel with friends or partner.		
No mention to climate or mild temperatures all year but good weather mostly on Spring and Summer.	Good climate on all seasons for experiences on nature and sea, making it possible to fully enjoy the destination all year long.	<table border="1"> <tr> <td><u>For Portuguese:</u> Good temperatures all year but good weather mostly on Spring and Summer.</td> <td><u>For foreigners:</u> Good temperatures and good weather all year.</td> </tr> </table>	<u>For Portuguese:</u> Good temperatures all year but good weather mostly on Spring and Summer.	<u>For foreigners:</u> Good temperatures and good weather all year.
<u>For Portuguese:</u> Good temperatures all year but good weather mostly on Spring and Summer.	<u>For foreigners:</u> Good temperatures and good weather all year.			

Source: Authors (2019), based on primary research

Furthermore, it is worth looking closer to the association of Madeira being a senior destination. One of the common goals of many brands is to make consumers loyal customers. Once loyal, costumers share with other potential consumers their positive experiences and become valuable advocates of the brand. On the case of Madeira island, most of the tourists who are loyal to the destination are of older generations. Although it works in favour of the destination to attract these age groups, it is working against it when it comes to attracting young tourists. Besides the locals, most people they hear talking about Madeira are not millennials, which leads them to perceive the island as a senior destination.

6. Recommendations

I) Adjust the Brand Image of Madeira Island for young tourists who have not visited the destination, to close the gap between the Brand Identity and the Brand Image.

The main goal is to change millennials wrong perceptions regarding the destination without them having to visit the island. This requires adjustments to the communication strategy used for promotion directly to the consumer and improving the experience of the ones researching

about what to do or when to go to Madeira. In order to convey an accurate image of the island, the suggestions are presented in Table 10.

Table 10: Recommendations regarding the adjustment of Brand Image

A. Adjust the line of communication
<p>Communicate more about the variety of nature-rich landscapes of Madeira, the diversity of experiences and the multitude of nature, adventure and nautical sports available on the island all year long. This is in line with the Madeira Ocean Trails campaign they are developing. Two aspects deserve focus:</p> <p>The experience provided is comparable to the one in attracting destinations: Many European young tourists are crossing continents for experiences and views they do not know they can have so close to them. Including Portuguese, who only consider Madeira for domestic travel but not when thinking about an adventure in a nature destination. APM should take advantage of the similarities between Madeira and other nature destinations more popular among young generations, such as South America, Southeast Asia, New Zealand, Sri Lanka or Mexico. Although not considered direct competitors because they do not verify the criteria of proximity, they have resembling landscapes and offer several sports activities leveraging on them. To convey that in Madeira they can live the kind of experiences they associate with other incredible places, APM could run a comparison initiative on social media. Putting side by side identical photographs of Madeira and those popular destinations, it could then challenge people to guess which image corresponds to each location. The content of these images should be mainly landscapes and people doing sports activities taking place on nature and sea. Examples of twin-images are available in Appendix D.1. While showing the true face of Madeira, this initiative would create opportunities for the brand to engage with consumers as it invites for a response. This content would be the perfect fit for stories on Instagram and on Facebook.</p> <p>The climate: The good climate in Madeira throughout the whole year should be explicitly communicated. It is of paramount importance that the divergent perceptions of the weather are clarified, plus the climate was one of the highlighted characteristics of the experience in Madeira for young tourists. It is crucial to transmit that the weather in Autumn and Winter is many times sunny and almost always adequate to do activities in nature and the sea. This could be executed, for example, by frequently posting videos or pictures on social media of sunny views captured on that same day, especially on those seasons. They should clearly stand out the light and the real feel temperature since in Madeira the temperatures feel hotter due to the humidity levels. Since Portuguese millennials showed to be the ones that underestimate more the weather on the island during Autumn and Winter, even after visiting, it could be interesting to make those posts on days the weather is very unfavourable in Lisbon or other cities of the mainland. Additionally, practical tips on how young tourists can leverage on the several microclimates of the island should be promoted. It enables visitors to choose, each day, what activities they feel like doing because most likely there will be a place where the weather is good for it. APM must show this intrinsic characteristic of the island adds flexibility to the experience, a very appreciated factor by young tourists on their travels.</p>
B. Promote more informative content.
<p>Madeira must be conveyed as an undoubtedly active destination. Although having on their website (Madeira All Year) information about the activities taking place on the island, APM could make this content available in a more interactive and personalised way.</p> <p>A digital platform that allows tourists to simulate their activity plan in Madeira could be developed. It will improve the integration of the touristic products' offer and highlight the redirection paths to the websites of APM's associate members, which is where conversion effectively takes place. Further characterizing the suggested platform:</p>

Usability: People would choose one from several pre-made plans of different types (e.g. “Chilling in Madeira Island”, “Exploring adventure in Madeira Island”, “Radical sports in Madeira Island”, “Madeira Island by a local”) and indicate the duration of their stay. Sequentially, a list of suggested experiences would be generated, including activities and spots of interest all over the island. This list would be automatically organized to make up the most efficient daily plans, considering the geographic location, opening schedules (of activities and locations) and duration of the activities. The plans could be personalised by adding or removing any of the experiences or even to consider the location of the accommodation as the starting point each day.

Functionalities: The central piece of the screen would be a map of Madeira with the daily itineraries drawn. This will clearly transmit that the island has many more areas to explore beyond Funchal. It will be possible to zoom in on each day individually upon selecting this filter. By clicking on the pin of one of the activities, more detailed information would show up, e.g. regarding which companies provide it and respective website link, recommendations, practical tips. There should be a highlighted note on one of the top corners with mention to the climate, e.g. “These activities can be enjoyed all year long in Madeira, including on Autumn and Winter! Check the webcams available on Madeira Web each morning, to pick the daily plan that best suits that day.”. There should be an option for users to provide their email to receive a pdf version of the plan created for them. The platform would also be used as a lead generator. The leads collected could be used to create lookalike audiences on Facebook and Instagram to target in future marketing campaigns.

“Talk to a local” chat: This initiative of the platform would require the participation of the local population of Madeira, which is expected to positively collaborate as they are known for being very welcoming hosts, willing to show visitors the best their island has to offer. The chat would allow tourists to talk directly to locals and ask questions they have regarding Madeira and the experience they could have there. Not only do consumers tend to have more trust in peers than in brands, but also the expertise of locals is very appreciated by young tourists as we have seen. A chatbot would initiate the dialogue and ask a few questions about the profile of the tourist, to assure adequate tourist-local pairing. We want to avoid a millennial asking questions about adventure sports to a grandmother that knows all about tea houses in Madeira.

Promotion: The platform should be promoted through the social media channels managed by APM. When communicating about activities that take place on the island, tourists should be invited to further explore what the island has to offer and guide them to try the platform. A link re-directing to the platform should be made available: on the description of Facebook posts, on the bio of Instagram and on the swipe-up for stories.

Source: Authors (2019)

II) Increase brand advocacy among young tourists.

Madeira is perceived as a senior destination by many young tourists who have not been to the island. As we have seen, this association is highly connected with the advocacy of the destination being done mostly by older generations. To increase Brand Awareness among young tourists it is necessary to initiate advocacy from millennials. Since all interviewees who travelled to Madeira mentioned it exceeded their expectations and most of them showed the desire to re-visit, getting more millennials to visit the island will exponentially increase the

reach of favourable word-of-mouth. Hence, initially, more than captivating them, APM should create opportunities to convert young tourists into visitors of Madeira.

As the motivation for millennial tourists to visit the island was different between Portuguese and foreigners, the approach pursued in domestic and international markets should go accordingly. Recommendations on how to address both are presented in Table 11.

Table 11: Recommendations on how to convert young tourists

A. International Markets
<p>Create packages, in partnership with its associates, to be promoted in Universities around Europe. These should be specifically thought for millennial tourists, focusing on nature and sea experiences and include accommodation, activities and transfers. It would allow to reach and mobilize to Madeira a considerable number of millennials with a single initiative</p> <p>Since the target of this initiative are students, the academic calendar should be considered. The trips should take place after the exams' season or between semesters. APM would be able to promote Madeira off high-season (October to June, excluding Christmas and New Year's Eve) and offer accessible prices for students.</p> <p>APM can leverage on being responsible for the composition of the packages to show the full potential of an experience in Madeira for millennials. Nonetheless, the packages should allow for a certain degree of personalisation in terms of activities. At least two options for each slot of nature, adventure or nautical sport should be made available, to provide freedom of choice to each tourist.</p>
B. Domestic Market
<p>Visiting local friends was the strongest motivation for millennial Portuguese tourists to visit Madeira. Therefore, APM should explore this motive to convince more young tourists to travel to the island. The suggested strategy would intervene in two fronts: initiate a movement of curiosity and desire on behalf of the tourists and, at the same time, provoke locals into wanting to show their island.</p> <p>A social media campaign igniting the dialogue between potential young visitors and their local friends should be implemented. One example of a caption for an Instagram post would be "Tag your local friend who needs to take you to drink the best Poncha in Madeira." ("Marca o teu amigo madeirense que tem de te levar a provar a melhor Poncha da Madeira."). If they were to be promoted inorganically, they should target only Portuguese speakers.</p> <p>Furthermore, giveaways, for young tourists, of flights to Madeira or activities on the island should be promoted on social media. People would be asked to follow the page of Visit Madeira, tag a certain number of friends in the comments and share the post on stories tagging Visit Madeira. There should be an age limit on valid participants as the aim is to take more millennials to the island. Since the goal is to increase the reach of millennials advocacy, flight tickets should be given out in the most disperse way possible. As normally Portuguese millennials are visiting local friends, the flights could be drawn individually and still be seen as an attractive prize. As for the experiences, they should be drafted in pairs, with the condition that at least one of the users must be a non-local.</p> <p>Finally, APM could design a guide specifically for tourists visiting the island with a local, "Discovering Madeira with a Local" ("Descobrir a Madeira com um madeirense"). It would contain recommendations and practical tips, e.g. detailed information about each activity, how to book them and give precise indications of how to get to the spots of interest (exact GPS coordinates and visual references when off-road). This guide should, at least initially, only be available in Portuguese, so as to confer a sense exclusivity to the experience. The content can be used for lead generation, by asking</p>

for an email to send the guide. Once again, the leads could be used to create lookalike audiences on Facebook and Instagram to be impacted by future social media campaigns.

Source: Authors (2019)

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A Work Project presented as part of the requirements for the Award of a Master Degree in Management from the NOVA – School of Business and Economics.

**HOW TO ATTRACT MORE YOUNG TOURISTS
TO MADEIRA ISLAND? A CASE STUDY ON THE
BRAND IMAGE OF A TOURISM DESTINATION**

APPENDICES

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A Project carried out on the Master in Management Program, under the supervision of:

Professor Catherine da Silveira and Lena Kemna

03.01.2020

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Section A – Contextual Background Appendices

Appendix A.1: Interview Guide: Experts from APM

Table 1: Interview Guide - Experts from APM

<p><u>Brand Identity</u></p> <p>What are the most salient features of the destination Madeira?</p> <p>What does the destination Madeira want to offer to its visitors? What experience does Madeira desire to provide them?</p> <p>Describe the ideal tourist for Madeira.</p> <p>If Madeira was a person, how would you characterize it?</p> <p>Which are the core values of Madeira?</p> <p>How should a tourist feel by visiting Madeira?</p> <p><u>Positioning</u></p> <p>Who are the target tourists of Madeira?</p> <p>Which levels of competitors have you defined for Madeira? What is the category where the destination Madeira is inserted in?</p> <p>What does the destination Madeira have in common with its competing destinations?</p> <p>How is the destination Madeira different from its competing destinations? What is unique about Madeira?</p> <p>What reasons would make a tourist believe in this uniqueness? Which facts justify this?</p> <p><u>Promotion and Communication Strategy</u></p> <p>What is the promotion and communication strategy for Madeira? Which channels do you use and type of content?</p> <p>What is the plan for social media? How do you manage it?</p> <p>Is there a strategy focus on targeting young tourists (millennials)?</p> <p>Which are the most prominent markets of young tourists for Madeira? Which others are showing growth potential for that age group?</p>
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Source: Authors (2019)

Appendix A.2: Touristic product portfolio of Madeira

SRETC structured the portfolio by dividing the touristic products into three different levels of assets (SRETC, 2016), taking in consideration the assets': maturity (stage of development), evolution capacity (potential of development), interest and demand generated (reason to develop). Figure 1 shows the structure of Madeira's touristic portfolio.

Figure 1: Structure of Madeira's touristic portfolio



Source: SRETC (2016)

Strategic Assets are the core elements of the destination experience, the ones that have more natural resources, infrastructures and local businesses to rely on. The constituting products of each *Strategic Asset* are listed in Table 1. *Nature Tourism* benefits from the predominant resources on the island, it suits different audiences and demanding standards. *Nature & Adventure Sports* leverage on the intrinsic characteristics of the landscape, the all year long warm climate and can satisfy an exponentially growing market segment, outdoor sports (e.g. running, trail, BTT). *Cultural and Landscape Touring* also takes advantage of Madeira's natural resources and connects them with history and culture, drawing several market segments. *Nautica and Sports* are associated with one of the main resources of the island, the sea. This asset shows considerable growth potential due to the wide range of activities that can take place and by appealing to some strategic markets of the destination. Finally, *Sun & Sea* which Madeira can offer throughout the whole year, seducing markets looking for winter sun. Moreover, it is the most demanded asset in the world for tourism and SRETC considers the island has the resources to attract families and senior couples looking for it.

The *Strategic Assets'* products are identified in Table 2.

Table 2: Strategic Assets' products

Strategic Asset	Products	
Nature Tourism	Birdwatching Laurissilva forest - UNESCO World Heritage Site Biosphere reserve Natural reserves Horse riding	
Nature & Adventure Sports	BTT Canyoning Jeep tours Hiking Trail running Trekking	Hang-gliding Paragliding Climbing Rapel Slide Orienteering
Cultural and Landscape Touring	Festivities and traditions Patrimony and Landscape	
Nautica and Sports	Scuba diving Sport fishing Paddleboarding Surf Sailing Windsurf	Cruises Whales and dolphins watching Boat rides
Sun & Sea	Sea Natural swimming pools Pool and beach complexes Beach	

Source: Authors (2019), based on secondary research (SRETC, 2016)

Complementary Assets though not having the strength to be a core strategic product, have a key role in enriching the touristic experience of Madeira and improve tourists' satisfaction. *Health & Wellness* leverages on the natural resources with therapeutic characteristics, the climate and is very much in line with strategic products connected to nature. *Gastronomy* is one of the most relevant variables considered by tourists when choosing a destination and Madeira's traditional products and cuisine are very much appreciated by visitors. *Madeira Wine* enjoys an international reputation, has associations with historic and cultural landmarks such as the American independence or references in Shakespeare's books, adding value to the experience. Finally, *Secondary Products* are assets that exist on the island but in reduced dimension and not competitive enough for those of other destinations. On this level are *Golf, Resort, Meeting Industry (MICE)* and *Residential*.

Appendix A.3: Brand Identity Prism: Theoretical Background

Figure 2: Brand Identity Prism - Theoretical Background

Physical

“Most salient brand features”

Personality

“What kind of person it would be if it were human”

Relationship

“Counterpart given by the brand to its consumers/users”

Culture

“Set of values feeding the brand’s inspiration”



Reflexion

“Brand’s “projected/desired consumer type”

Self-Image

“What managers expect consumers to feel when purchasing/using the brand”

Source: Authors (2019), based on secondary research (Kapferer, 2008)

Section B – Methodology Appendices

Appendix B.1: Pre-Recruiting Questionnaire

Table 3: Pre-Recruiting Questionnaire

<p><i>I am conducting research on how to attract young tourists to Madeira island, for a work project that is part of my Master degree in Management, of Nova School of Business and Economics. It is crucial to understand the behaviours and preferences of your generation when it comes to booking and travelling.</i></p> <p>Have you ever been to Madeira Island? Yes / No If yes, how many times? Once / More than once / Regularly Have you ever travelled independently (meaning without your family) for leisure? Yes / No If yes, how often? Once / Occasionally / Regularly Age: 15-25 / 26-35 / 36-45 / 45-60 / 60+ Nationality:</p> <p><i>I would really appreciate your collaboration to be interviewed for this research. Your contribution is a tremendous help for the successful completion of my work project. If you would be available to be contacted for research purposes, please leave your contact below. Thank you!</i></p> <p>Email or Phone number:</p>
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Source: Authors (2019)

Appendix B.2: Interview Guide: Young tourists who have never visited Madeira (Group A)

Table 4: Interview Guide - Group A

Warm-up

“First of all, thank you for agreeing to be interviewed for this work project which is part of my Master degree in Management, from Nova School of Business and Economics. I am conducting research on how to attract young tourists to Madeira island, in collaboration with Madeira’s Promotion Association. It is crucial to understand the behaviours and preferences of your generation when it comes to booking and travelling. I would like to know about your previous experiences on this matter. For the purpose of analysing this interview later, I will ask your permission to record it. Everything discussed here is completely confidential. Today we will be using a technique that is quite different from a standard questionnaire. There are no right or wrong answers. I will ask you very broad questions, feel free to tell me whatever comes to your mind about the topic.”

Questionnaire

1. “Please think about the times you travelled independently, meaning without your family. Who do you go with? How do you choose where to go and how do you usually do the booking?”

Topics to be developed

Duration of stay

- No of days
- Adequacy

Destination Decision-Making Process

- Considered set of destinations
- Previous references
- Search channels
- The theme associated with the destinations considered
- Activities of interest in the set of destinations
- Perceptions on the considered set
- Barriers in the decision-making process

Flight Booking Behaviour

- Search channels
- Booking channel
- Timing
- Airport/Airlines
- Price Range
- Barriers

Accommodation Booking Behaviour

- Category
- Previous references
- Search channels
- Booking channel
- Timing
- Accommodations
- Prince range

- Barriers

2. *“What kind of things did you do there and did you plan it in advance?”*

Topics to be developed

Activity Planning and Booking

- References
- Search channels
- Booking channel
- Organization
- Timing
- Activities
- Price range
- Barriers

Assets of Interest

- Type of Asset
- Niches
- Theme
- Geographical dispersion

3. *“Have you heard about Madeira island? What do you know about it? Have you ever considered going there?”*

Topics to be developed

Perceptions and Brand Image of Madeira

- Perceptions before going to Madeira
- Expectations
- Associations
- Limitations

End of interview

The respondent is asked to fill in information about his/her profile and assured those will stay confidential.

Respondent’s Profile

- Age
- ___ [15, 25[
___ [25, 35]

- Nationality
 - Gender
 - Civil Status: Single / Dating casually/ In a committed relationship / Married
 - Education Level
- ___ Less than high school degree

- ___ High school degree or equivalent (e.g., GED)
 - ___ Some college but no degree
 - ___ Associate degree
 - ___ Bachelor's degree
 - ___ Master's degree
- Job/Occupation

Source: Authors (2019)

Appendix B.3: Interview Guide: Young tourists who have visited Madeira (Group B)

Table 5: Interview Guide - Group B

Warm-up

“First of all, thank you for agreeing to be interviewed for this work project, which is part of my Master degree in Management, of Nova School of Business and Economics. I am conducting research on how to attract young tourists to Madeira island, in collaboration with Madeira’s Promotion Association. It is crucial to understand your behaviours and preferences when it comes to booking and travelling. I would like to know about your previous experiences when visiting the island. For the purpose of analysing this interview later, I will ask your permission to record it. Everything discussed here is completely confidential. Today we will be using a technique that is quite different from a standard questionnaire. It is a non-directive method, meaning I will not be asking direct questions about a subject. After the first question, feel free to tell me whatever comes to your mind about the topic. There are no right or wrong answers.”

Initial Question

“Please, think about your holidays in Madeira. Tell me about how you decided to go there, how you planned it, what you did.”

Topics to be developed

Type of holidays

Duration of stay

- No of days
- Adequacy

Destination Decision Making

- Considered set of destinations
- Previous references
- Search channels
- The theme associated with the destinations considered
- Activities of interest in the set of destinations
- Perceptions on the considered set
- Barriers in the decision-making process

Flight Booking Behaviour

- Search channels
- Booking channel
- Timing
- Airport/Airlines
- Price Range

- Barriers

Accommodation Booking Behaviour

- Category
- Previous references
- Search channels
- Easiness to find and quality of information
- Booking channel
- Timing
- Accommodations
- Price range
- Barriers

Activity Planning and Booking

- References
- Search channels
- Booking channel
- Organization
- Timing
- Activities
- Price range
- Barriers

Assets of Interest

- Type of Asset
- Niches
- Theme
- Geographical dispersion

Perceptions and Brand Image of Madeira

- Perceptions before going to Madeira
- Perceptions after being in Madeira
- Expectations
- Associations

End of interview

The respondent is asked to fill in information about his/her profile and assured those will stay confidential.

Respondent's Profile

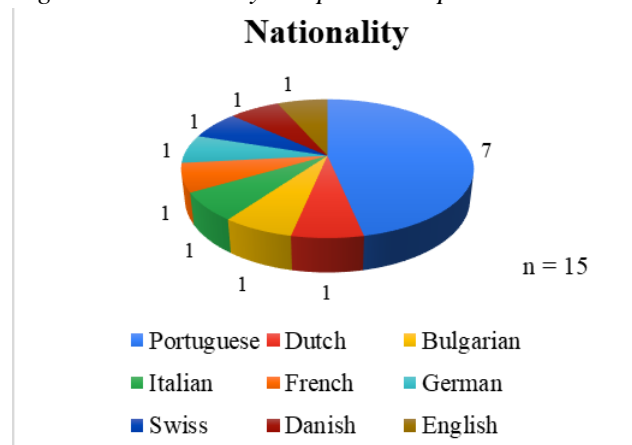
- Age
 ___ [15, 25[
 ___ [25, 35]
- Nationality
- Gender
- Civil Status: Single / Dating casually/ In a committed relationship / Married
- Education Level

- ___ Less than high school degree
- ___ High school degree or equivalent (e.g., GED)
- ___ Some college but no degree
- ___ Associate degree
- ___ Bachelor's degree
- ___ Master's degree
- Job/Occupation

Source: Authors (2019)

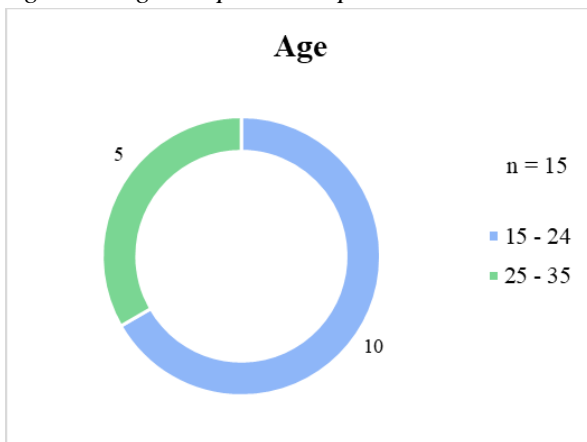
Appendix B.4: Respondents' Profile Data: Group A

Figure 3: Nationality Graph – Group A



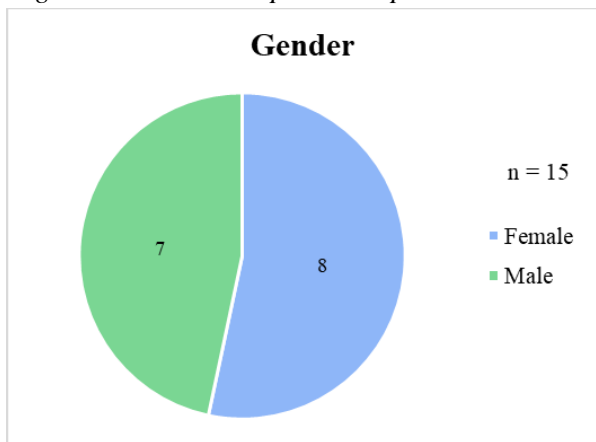
Source: Authors (2019), based on respondents' profile data

Figure 4: Age Graph – Group A



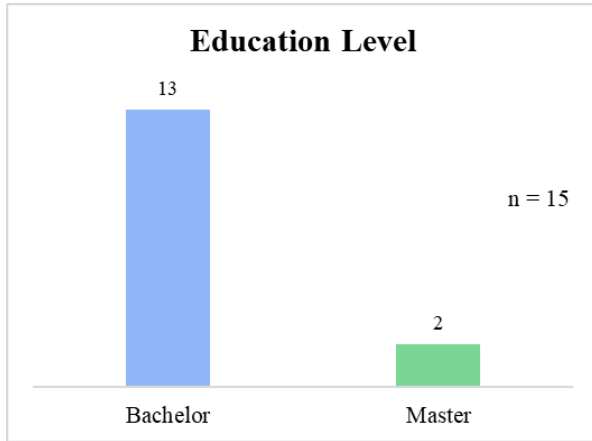
Source: Authors (2019), based on respondents' profile data

Figure 5: Gender Graph – Group A



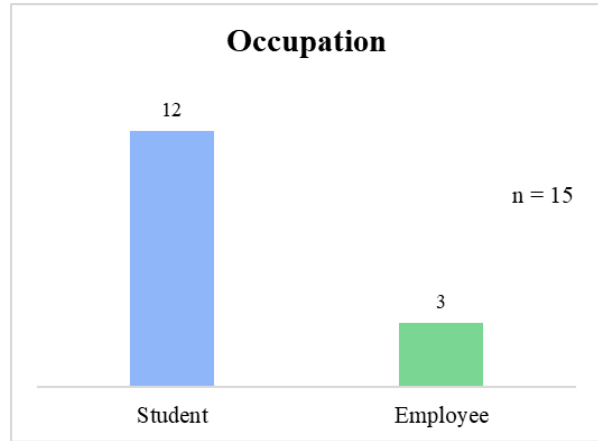
Source: Authors (2019), based on respondents' profile data

Figure 6: Education Level Graph – Group A



Source: Authors (2019), based on respondents' profile data

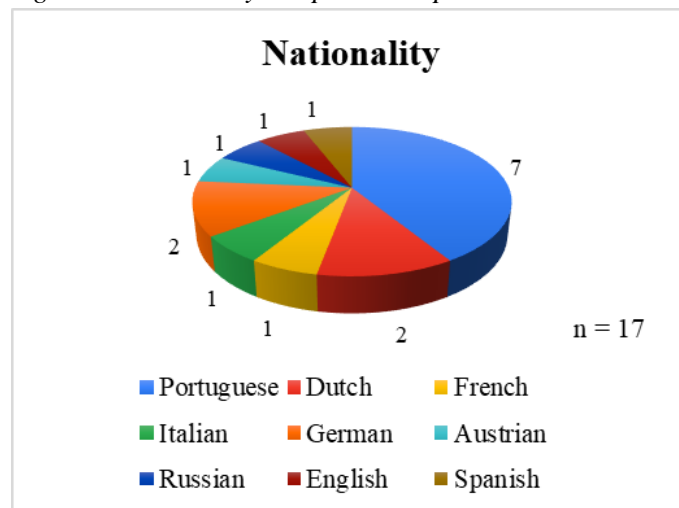
Figure 7: Occupation Graph – Group A



Source: Authors (2019), based on respondents' profile data

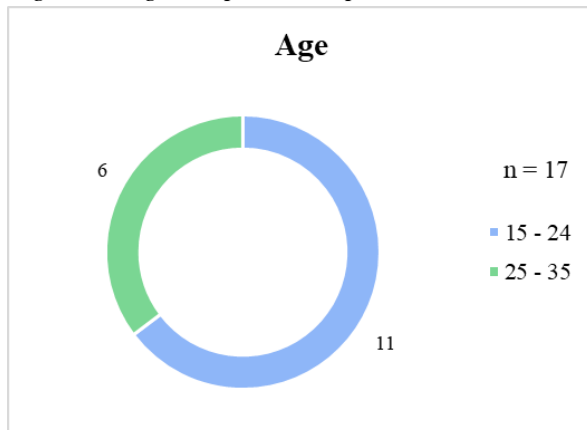
Appendix B.5: Respondents' Profile Data: Group B

Figure 8: Nationality Graph – Group B



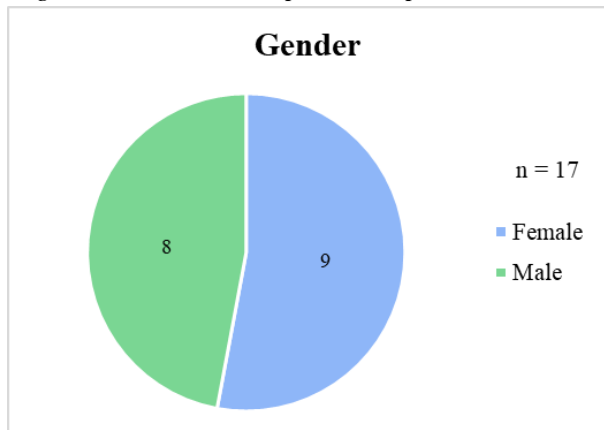
Source: Authors (2019), based on respondents' profile data

Figure 9: Age Graph – Group B



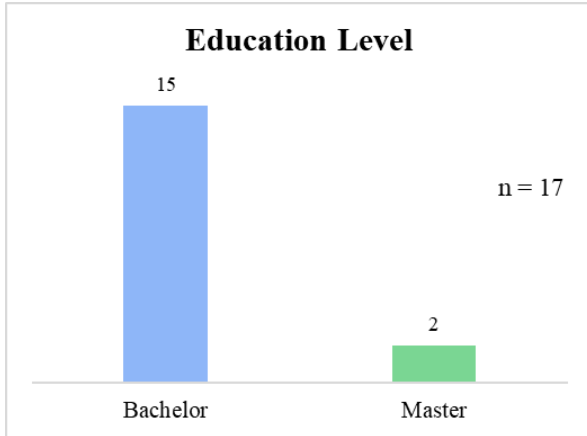
Source: Authors (2019), based on respondents' profile data

Figure 10: Gender Graph – Group B



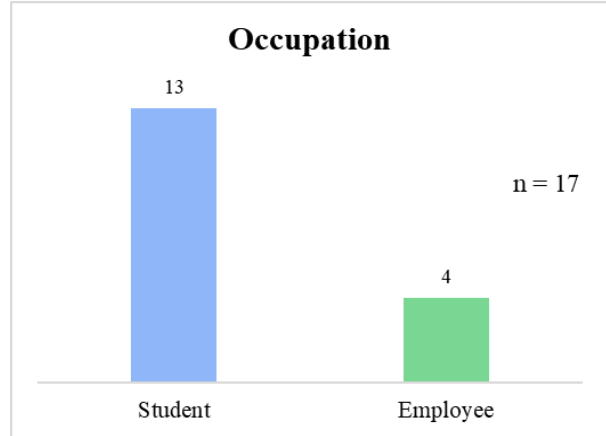
Source: Authors (2019), based on respondents' profile data

Figure 11: Education Level Graph – Group B



Source: Authors (2019), based on respondents' profile data

Figure 12: Occupation Graph – Group B



Source: Authors (2019), based on respondents' profile data

Section C – Research Appendices

Appendix C.1: Word-cloud of strongest associations to Madeira having visited the island

Figure 13: Word-cloud

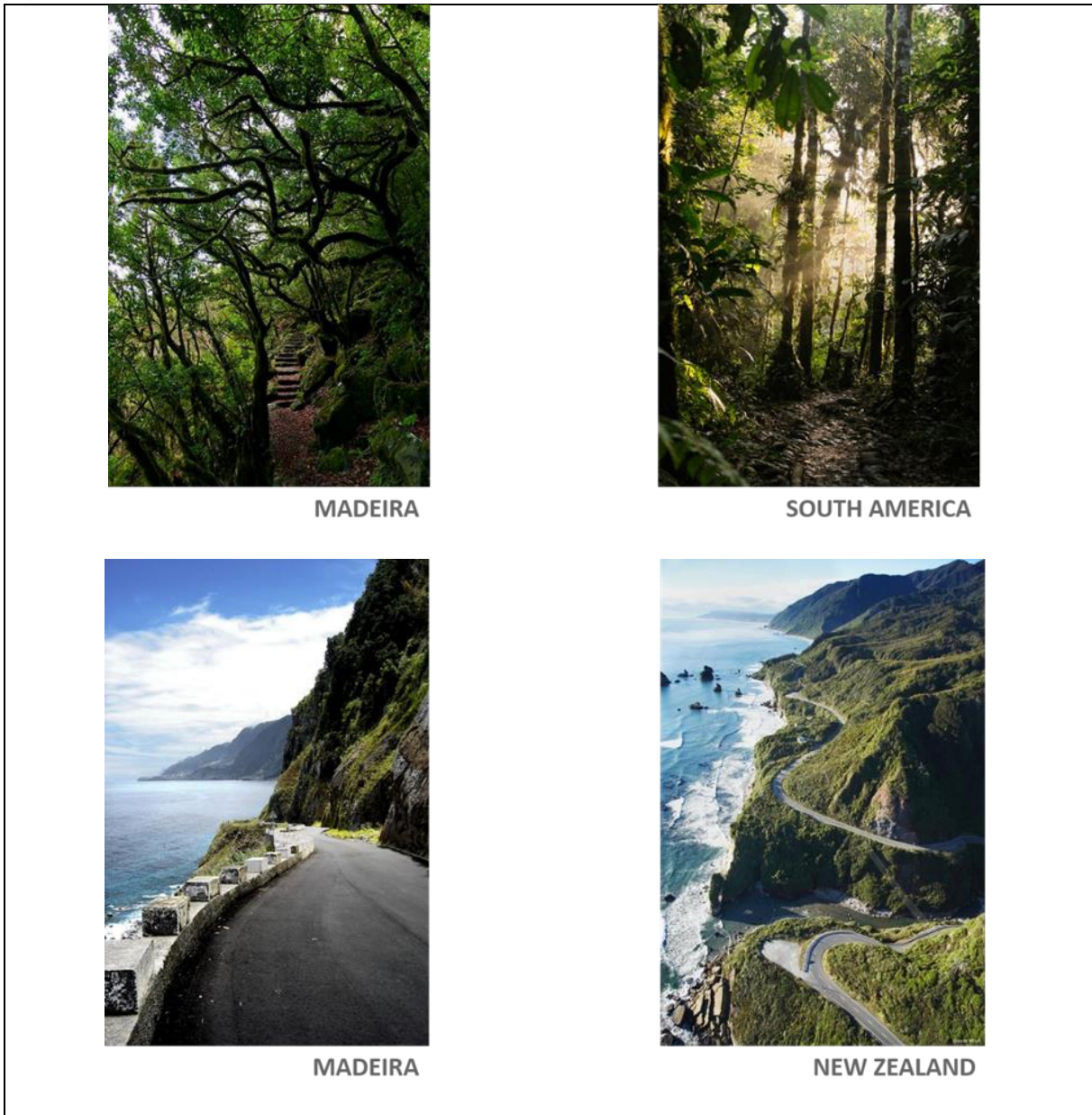


Source: Authors (2019), based on primary research

Section D – Recommendations Appendices

Appendix D.1: Twin-images of Madeira

Figure 14: Examples of twin-images





MADEIRA



SRI LANKA



MADEIRA



THAILAND



MADEIRA



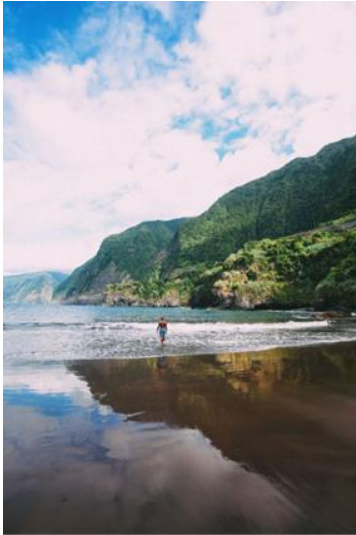
SLOVENIA



MADEIRA



NEW ZEALAND



MADEIRA



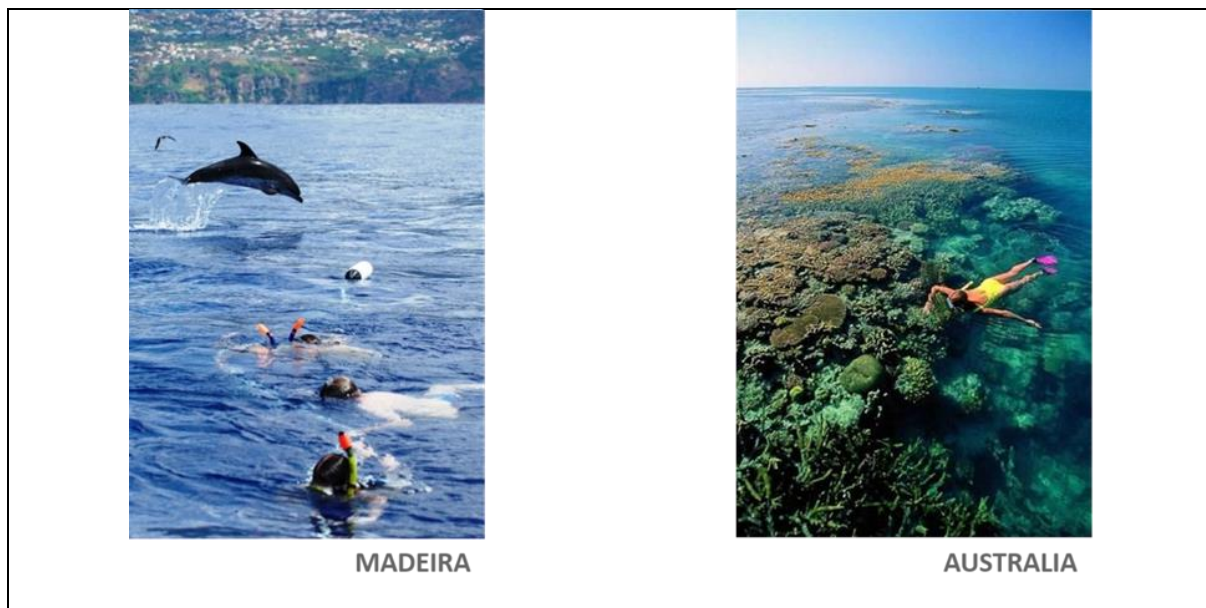
CROATIA



MADEIRA



CROATIA



Source: Authors (2019), images adapted from secondary sources, retrieved through Google search

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