TOURISM DESTINATION IMAGE AND ITS IMPLICATIONS FOR DESTINATION BRANDING AND COMPETITIVENESS: THE CASE OF THE UK MARKET IN THE ALGARVE

Submitted by

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I certify that all material in this thesis which is not my own work has been identified and that no material has previously been submitted and approved for the award of a degree by this or any other University.

ABSTRACT

This study develops and empirically tests a model of tourism destination image in different periods of time, namely in the pre/post-visit (measuring the tourist satisfaction) and the peak/off-peak (exploring the seasonality factor). It is applied to the UK market visiting the Algarve as a tourism destination. Its aim is to contribute towards a better conceptualization of destination branding and competitiveness practices. The existence of a gap in the literature related to the field of destination marketing strategies based on knowledge of destination images was the starting point for this research. This knowledge can improve the efficient allocation of resources, particularly in the context of increasing destination competitiveness and travellers' limitations in terms of time and money. To empirically test the model, the research applies a mixed-methods approach based on semi-structured interviews conducted with tourist stakeholders within the Algarve and questionnaires applied to tourists who visit the destination.

The findings suggest that the Algarve's image tends to be differentiated in the pre/post-visit and in the peak/off-peak, which result in establishing important aspects to distinguish the marketing strategies. The segments of the first-time and the repeaters have different preferences and characteristics regarding the type of accommodation chosen, the return intention and age profile. The Algarve image modifications are connected with the type of booking the visitors opt to make the reservation, the return intentions, the willingness to recommend the Algarve to friends and relatives and if it is the first or repeat-visit. Generally, tourists do not recognise "administrative boundaries" but rather the entire destination of the Algarve. As a consequence, the competitiveness and branding approach to the region should be global, as defended in the literature. The results are considered an on-going process, where the stakeholders must be continuously involved due to the importance of their opinion to identify the main strengths and weaknesses of the Algarve as a tourism destination.

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Chapter 1 Introduction

1.1 Background Context

Considering that image is a wide-ranging concept, multidimensional and difficult to measure (Kastenholz, 2002; Phelps, 1986), understanding and quantifying its general structure and attributes is a rewarding challenge. This research is considered a continuous process with possible implications/contributions for destination policy-managers, planners and general stakeholders, in terms of promoting better branding strategies and improving destination competitiveness.

Tourism destination image (TDI) is a key element in destination decision-making and has been studied since the early 1970s (e.g. Hunt, 1975) in the context of destination strategies and marketing. Understanding this broad concept requires knowledge of its influential factors, which helps the institutions responsible for the promotion of a destination to project a proper image into markets through the selection of an appropriate mix of communications (Crompton et al., 1992) and a proper branding strategy. The basic assumption is that TDI functions as an important component of tourism management and development, namely in branding and competitiveness strategies.

Lee (2009: 217) reinforces the importance of TDI, noting that “destination image can assist managers by identifying the strengths and weaknesses of their destination, helping predict tourists’ behavioural intentions and providing critical insights for managing and developing tourist destinations”.

Woodside and Lysonski (1989) observe that TDI enables the differentiation of tourism destinations, and that destinations with strong images are more likely to be chosen by tourists. Image is important in terms of tourism destination satisfaction, considering existing expectations and the performance of the destination.

The study is based on the major tourism destination of Portugal, the Algarve, the most southern region of mainland Portugal, with an area of 4,997 square kilometres (1,929 square miles) and 451,000 inhabitants. Today the Algarve is the most important tourism destination in Portugal, representing in 2013 about 33.2% of the total overnights stays and 31.5% of the total revenue in tourist accommodation establishments of the country (IMPACTUR, 2014). The economic importance of tourism was previously confirmed by WTTC (2003), with the travel and tourism industry (direct impacts) expected to contribute 44.7% to Algarve's Gross Domestic Product and 66.0%, if the travel and tourism economy (direct plus indirect impacts) are taken into consideration.

This is a reality that started to be realised following the inauguration of the international airport in 1965, which introduced a new cycle in the Algarve's economy, namely the strong growth of the tertiary sector. In 1964, the Algarve registered 3,690 overnight stays. Two years later, in 1966, 69,272 were registered and, in 2012, 14,326,774 overnight stays and 106,625 bed places at lodging units. During this period, there was an annual average growth rate, respectively of 15.5% (overnight stays) and 7.4% (bed places offer).

To maintain a strong image throughout several decades of growth in tourist demand is particularly demanding. Territories, markets and agents' behaviour changes over time, and destination images have to evolve accordingly but, at the same time, maintain coherence and identity. When applied to the Algarve this challenge is evident, since the Algarve is a mature tourism destination (Perna et al., 2013), with inherent critical needs after four decades of tourism demand growth and tourism specialization.

Knowing about TDI perceptions and expectations, along with the tourist´s destination experience, is a process that will allow the development of better branding and competitiveness practices. These are two critical aspects of destination revitalization in a region where the economy is reliant on the tourism sector. For these reasons, and for the importance of tourism in terms of employment and economic value, this is a region that is worthy of study.

This research provides evidence for the important contribution of destination image and applied destination choice models, including influential image variables, to generate a systematic model of analysis on TDI. This is based on a background context of the Algarve's image amongst the UK market. The model is considered a useful tool in understanding branding and competitiveness within the context of tailored marketing strategies.

The decision to examine the pre/post-visit images was driven by a lack of research which has explored how images change after the visit. This is a gap expressed by O'Leary and Deegan (2005), Wade and Eagles (2003) and Pike and Ryan (2004). The peak/off-peak analysis was motivated by a second gap identified by Chi and Qu (2008) which points to the lack of research that explores how images change over the seasons (seasonality factor). The model also includes tourism destination stakeholders' views recorded through semi-structured interviews which help fill the gap regarding the need to have an "integrated marketing process" as highlighted by Elbe et al. (2009). For that reason, it was considered important to introduce the views of the different stakeholders in the model in order to propose measures to enhance destination branding and competitiveness strategies.

Regarding the different variables introduced into the model, these were considered to be the demographic characteristics of the visitors as suggested by the majority of the studies in the area, followed by the designated travel behaviour which includes most of the variables measured in tourism destinations image studies, and others added by the author. Although complex in terms of the variables included, and the different periods of time considered, this model offers a manageable way to understand the visitors' main complexities regarding destination image, aiming to contribute to improved destination marketing strategies and competitiveness.

1.2 Aims and Objectives

The aim of this thesis is to develop and empirically validate a systematic model of TDI in different periods of time, i.e., in the context of the pre/post-visit (measuring the visitor satisfaction) and in the peak/off-peak (seasonality), with focus on the UK visitors of the Algarve. The measurement of the peak/off-peak image differences was considered relevant to the model, taking into account the gap identified by Chi and Qu (2008) in their work on seasonality measurement. The Algarve, with its common characteristics of the sun and sea destinations, suffers from a high degree of seasonality, reinforcing the need to study this reality. This aim is researched by means of the following objectives:

1. To investigate the framework of destination image concepts and related methodological developments in destination branding and competitiveness models.

The research in these three fields of investigation (image/destination branding/competitiveness) does not appear to be specifically undertaken elsewhere. Blain et al. (2005), highlight these three fields of research due to the importance of destination image in destination choice, in order to better destination branding strategies so that the desired competitiveness is achieved.

2. To create a model of analysis for TDI measured in different periods of time and composed by the main variables which could improve destination branding and competitiveness strategies.

Due to the lack of research between the links of these three fields of research as discussed in objective 1, there is no conceptual and empirically tested model that measures TDI in the context of destination branding and competitiveness. The analysis of pre/post-visit along with peak/off-peak periods were introduced due to the lack of research in this area as discussed by Chon (1990) and Pearce (1982) and Chi and Qu (2008).

3. To compare the profiles and images of four different target markets of visitors: pre/post-visit and peak/off-peak seasons in the Algarve as a tourist destination.

At present, this is the first research that compares the profiles of the visitors in the pre/post-visit and in peak/off-peak seasons. This information could be extremely important to the branding strategies in terms of better management practices.

4. To investigate the secondary image (pre-visit) as opposed to the primary image (post-visit) of the Algarve as a destination, by applying models of TDI and testing the differences between pre/post-visit and peak/off-peak seasons.

Currently, there does not appear be any research that tests the differences in these four periods of time applied to a sun and sea destination. This research will help increase the debate and give inputs to new destination marketing strategies.

5. To develop an integrated image of the Algarve as a tourism destination.

There is a need to develop research on the destination image applied to the specific characteristics of the Algarve as a tourism destination. This integrated image, obtained through a factorial analysis, considering the perceptions of the main foreign market (the UK) that visit the Algarve, is a good starting point to improve marketing strategies.

6. To analyse whether first/repeat visitors and variable image modification have an impact on travel behaviour and visitor profiles.

This objective was formulated bearing in mind the importance of the repeaters in the Algarve and follows the recommendations of Qu et al. (2011), who consider it important to measure the overall image, which could influence future behaviour intentions. These two aspects were incorporated in the model of analysis in order to measure the links with different factors of destination image, namely travel behaviour, i.e. all the variables within the context of travel of the visitors and their profiles (i.e., the personal characteristics).

7. To propose measures to enhance destination branding and management practices based on the findings of this study.

Little, or very intermittent, research has been undertaken to give inputs to destination branding strategies supported by the perspectives of the local stakeholders and incoming visitors. This research strives to make a distinct contribution to the conceptualization of destination image as an instrument of destination branding and competitiveness practices, considering the views of the different stakeholders of the Algarve, and the perceptions of the UK visitors.

1.3 STRUCTURE OF THE THESIS

To explain the research process and sequence followed, the thesis is organised in seven sequential chapters. After the introduction (Chapter 1), the literature review is developed in Chapter 2 along seven sections. These start with a discussion of tourism destination concepts as an input to understanding tourism delimitation in geographic terms, including its importance in defining a common brand and the influence of different users of a place. Next, the analysis considers the role of destination marketing in a destination management context. This guides the research towards an understanding of the role of the destination management organizations (DMOs) and destination marketing organizations in destination image making and branding, which will contribute to making final recommendations. The next sections, within Chapter 2, analyse tourism competitiveness and the complexities that it embraces in a globalized world. This analysis is extremely important in understanding the complexities of destination competitiveness as a concept and its assessment. Comprehension of this relationship enables a deeper understanding of the differences between the destinations enumerated in the fieldwork and could help to differentiate destinations and achieve the desired positioning. Subsequent sections are dedicated to the study of different destination image concepts and scopes, models of analysis for the process of destination image formation and destination image measurement. Finally, destination branding is analysed to understand branding specificities in the context of destination management and competitive strategies.

Chapter 3 concerns research methodological approaches, namely qualitative and quantitative research methods. The main differences between the two are emphasised, as well as the use of mixed methods in marketing and tourism. In this chapter, the design of the research instruments is described, namely the structure adopted for conceptualizing the semi-structured interviews and the questionnaire design. The next step in this chapter is the data collection procedure and its implementation. The sampling methods explain the different methods of sampling described in the literature and the sampling used in the research.

Starting with a case study, Chapter 4 develops the organizational evolution of the tourism sector in Portugal and the Algarve, followed by a description of the main public policies and instruments adopted in the last decade. These administrative and political frameworks regulate or influence global market behaviour, in which UK demand has constituted the most important market for Algarve tourism since its early years in the mid-1960s. This relation leads to the final section of this chapter, which describes the evolution of the UK market in the Algarve.

Chapter 5 is dedicated to stakeholder interviews and developing the main findings from the recording transcripts. In this chapter, eight topics are presented: a) tourism destination management issues, b) commercialization and negotiation of the Algarve as a destination, c) the Algarve's economic development, d) competitiveness aspects, e) consumer behaviour and segments of the Algarve as a destination, f) destination image making, g) the UK market in the Algarve, and an aggregate section dedicated to h) events and animation, low-cost airlines and tourism high and low seasons.

Chapter 6 presents the main results concerning the empirical application of the questionnaire instrument to pre/post-visit, in peak/off-peak. General tendencies are identified and key differences, when detected, are emphasised. These results lead the research to the main findings regarding visitor and visit profiles, travel behaviour, perceived destination image pre/post-visit and differences between first-time and repeat visitors and image modification.

Chapter 7 outlines the main research conclusions based on the most relevant findings in order to achieve the desired aim of using the role of image to support branding and competitiveness in the UK market for the Algarve. Closing the chapter are research limitations and proposals for future developments.

CHAPTER 2 LITERATURE REVIEW OF TOURISM DESTINATION MARKETING: IMAGE AND BRANDING

2.1 INTRODUCTION

This chapter aims to discuss the concept of image in the context of tourism destination marketing with a particular focus on competitiveness and branding. Paradoxes related to the delimitation of a tourism destination are identified via a discussion supported by a review of the literature drawn from different fields, with special attention paid to management.

The complexity of the image concept leads us to a conclusion about the importance of place delimitation in terms of image research and management activities, including those developed by DMOs. Image is also analysed in the context of its definition, conceptual models and measurement issues, as well as a management and marketing tool, in an environment of increasing competitiveness between destinations. Branding, as an emerging area of research, is analysed in relation to marketing and image. As a broad aim, the intention of the research is to promote a better understanding of the factors that influence image formation and the management implications of this field of study.

2.2 TOURISM DESTINATION CONCEPTS

The main objective of this section is to contextualize the concept of a tourism destination in order to understand the study's delimitation, i.e. the Algarve as a tourism destination. The starting point is that a destination exists in a geographical space, with limited resources, in which different uses and users facing internal and external influences, compete with other destinations for economic advantages.

Firstly, the notions of space and place are discussed. Secondly, tourism is argued as being a complex system composed, not only of delimited activities and places, but also of connections and flows. This influence and reconfigure the final place of tourism "consumption" or experience. Understanding the complexity of the system, where tourism takes place, raises the question of the place marketing's role. Therefore, it is not possible to separate place management from all the activities that are developed around a destination (including tourism). In the specific case of tourism and its relation to marketing, it appears that, due to the characteristics of tourism (intangibility, the great importance of individuals, multiculturalism and distance between place of purchase and consumption) the difficulty is increased.

As a starting point**,** the notion of a tourism destination embraces the notion of place, which leads to the question of what a destination is in the broad context of place. Harrison and Dourish (1996: 3) point to the distinction between space and place, where "a place is generally a space with something added – social meaning, convention, cultural understandings about role, function and nature and so on. The sense of place transforms the space". Regarding place's definition and the interactions that it embraces, Shaw and Williams (2004: 186) stress that these: "have to be viewed in a context of material relationships, but are not reducible to these"; and in the case of tourism places, these authors argue that there are "complex mixes" of "tourism and non-tourist practices" and "places do not exist as such but are actively constructed by social process, including tourism". More recently, Hultman and Hall (2012: 547) have reinforced this idea, referring to the way in which "Places are marketed in order to generate desired tourist, migrant, business, financial and other mobilities". In general, a place is referred to as something that is connected to activities (monetary or material) related to tourism, but not linked only to these.

The previous example emphasises that the delimitation and background of place is a complex question. If, for instance, it is considered delimitation for political and administrative reasons, conversely place (especially as seen by visitors) does not recognise administrative boundaries. In this context, Shaw and Williams (2004: 186) state, "We should not expect to be able to define place as discrete entities (…) that would kill the notion of place". In order to emphasize the sources that influence this complex concept, Urry (2000: 193) introduces the question of "scapes and flows". This author argues that "Scapes are the networks of machines, technologies, organizations, texts and actors that constitute various interconnected nodes along which owns can be relayed". In this circumstance, Shaw and Williams (2004) argue that it is not only the final place for consumption as tourism that matters, it is the process, journey, routes, infrastructures, superstructures and images that tourists hold of those options. Regarding this issue, Paskaleva-Shapira (2007: 11), in the context of cities, comments that the challenge is to view cities as "no longer spaces of place, but spaces of flows". It is interesting to look at cities/destinations in terms of economic development according to specificities and the patterns of growth required. The management of a destination as a space of flows could allow desired sustainable development. Shaw and Williams (2004: 3) point out that "scapes are significant because they contribute to the ascendancy of relative location over absolute location". In this context, scapes assume great importance in connecting flows somewhere between the components of the tourism system. Considering this complex inter-relation, tourism destinations are not dependent only on places, but on places and scapes, which depend on flows. They argue that scapes and flows "highlight the relationships and tensions between structures and processes". This is an important insight because it could help understand the challenges of tourism destination management.

Harrison and Dourish (1996: 3) state that "Physically, a place is a space which is invested with understandings of behavioural appropriateness, cultural expectations, and so forth. We are located in "space", but we act in a "place". Kotler et al. (1993) develop the concept of marketing places in which they present tourists, residents, investors, exporters and companies as target groups, while Parker (2008) focuses her attention on the question of place management. Kotler et al. (1996: 25) draw attention to four activities of place marketing, including: "developing a strong and attractive positioning and image for the community"; "setting attractive incentives for current and potential buyers and users of goods and services"; "delivering a place´s products and services in an efficient, accessible way"; and "promoting the place's attractiveness and benefits so potential users are fully aware of the distinctive advantages of the place".

Parker (2008) contextualizes place with three questions: "interdisciplinary boundary?", "bit of wilderness?" and "the place for place?". With these three questions, Parker highlights the interrelations between different perspectives of places, the different users of places and the place marketing perspective. This author stresses that "one of the most central concepts of human existence is that of place. We all spend our lives somewhere, in various towns, cities and other locations" (Parker, 2008: 9, 10). The author links places to marketing, stating that marketing acts "in terms of improving places, making sure place users get what they need (or want)". Relating to tourism, she argues that tourism consumes "tourism experiences" in places and underlines two premises of a place in terms of marketing:

- The marketer has some level of control over the place in which the consumer experience takes place;
- The place is merely the context of consumption experience, rather than a consumption experience in itself.

Moilanen and Rainisto (2009) debate the fragmentation of destination service providers and the repercussions of this for branding strategies. In their discussion, they state that although the supply side is fragmented, the demand tends to identify a single entity, which leaves space for a brand management strategy focused on an entire destination. Taking Moilanen and Rainisto (2009) into consideration, destination branding could act as an umbrella in terms of the management and marketing of a destination. They defend the importance of a commonplace brand with a single coordination, which could contribute to achieving a more competitive position. This happens because "the place's image communicates in the right way" Moilanen and Rainisto (2009: 1). These authors highlight the benefits of a place's brand as follows:

- Increases attractiveness of companies and investments;
- Promotes the objectives of the tourism industry;
- Promotes public diplomacy;
- Supports the interests of the exporting industry; and

- Strengthens citizens' identity by increasing self-esteem.

Law (2002) reinforces this idea, supporting the model of Jansen-Verbeke (1988) related to primary and secondary resources. Primary resources attract visitors to a destination, and secondary resources support travel or services at the destination. All these elements are called "product". Law (2002: 11) defends the idea of the promotion of a common product (destination resources) to be sold "to different markets (…) defined by demographics, lifestyles or geography".

Parker criticizes some visions of marketing, noting that "The marketing of places has often been seen as something you do to those outside a place, rather than those within it" (Parker, 2008: 10). As a starting point, a destination should be considered in the broad context of a specific location with its own characteristics and dynamics. Specifically, in the case of marketing tourism places, Ashworth and Goodall (1995) emphasize the difference between a "physical object" and a place that is "multi-sold" to different users and uses, as previously discussed in the case of place management. These authors stress that the destinations are not "mono-functional" but rather "multi-functional" on the supply side and have "multi-motivated" consumers on the demand side (Ashworth and Goodall, 1995: 218). They contextualize the process of the commodification of tourism, while Ashworth and Voogd (1994) acknowledge tourism destinations as commodities and explore this relationship. The nature of tourism makes this task special and more complex when compared with an ordinary product. These differences are related to (e.g. Ashworth and Voogd, 1994):

- The intangibility of tourism consumption;

- The existence of potential risk, because there is a physical distance between the local of consumption and the local for which the decision to travel to is taken. As a communication and information channel, the use of the Internet can reduce this risk;

- Different experiences for the same supply;

- The tourist does not know (or care) about the local administrative borders of a destination;
- Consumers have different needs and motivations;
- The experience does not transmit the right of propriety, in opposition to goods;
- Fragmentation of supply.

There is much more to say about tourism when compared to ordinary products, especially in the context of increasing globalization and competition. In considering the main differences, Ashworth and Goodall (1995), accepting the fact of tourism as a product, present the perspectives of place product, place consumers, place market and place selling. Due to the nature of tourism, they defend the importance of differentiating tourism place marketing from place marketing in general. In the context of tourism place marketing, they argue that "until this has been achieved in an integrated form, tourism place marketing remains an idea and an aim rather than a practical reality" (Ashworth and Voogd, 1994: 18).

Jansen-Verbeke (1986: 82) discusses tourism and leisure products in the context of the inner city. For this author, "the tourist product consists of a specific environment offering a spatially concentrated supply of facilities and setting, complementary to the leisure function of the inner city". She develops a model whereby she distinguishes the main categories of leisure products. The primary elements refer to the places where activities take place, from the perspective of supply, e.g. concerts, movies, events and exhibitions. These primary elements are, on one side, called "activity places", for events and entertainment and comprise a "leisure setting" which is the physical background in observing the social and cultural character of the place. She also distinguishes secondary elements, which are the main facilities that support a place visit, e.g. shopping and catering and such conditional elements as accessibility, parking and tourist facilities.

In assuming tourism as an integrated product, the next step is to try to go further with the definition of a tourism destination. Firstly, as a broad definition, the United Nations World Tourism Organization (UNWTO, 2007: 1) defines a tourism destination as being: “a physical space in which a tourist spends at least one overnight”. It includes tourism products such as support services and attractions and tourist resources within one day’s return travel time. It has physical and administrative boundaries defining its management, and images and perceptions defining its market competitiveness. Local destinations incorporate various stakeholders often including a host community, and can nest and network to form larger destinations. UNWTO makes reference to “tourism products”, referring to support activities and resources for the same-day visitor[1]. This definition may be balanced with Bull’s (1996: 3) contextualization of destination in terms of “the main objective” of the visit, whereby the author refers to the “transit point or stopover” as part of the travel, but not the “main objective”. Inskeep (1991: 22), mentioning Mill and Morrinson (1985) in the context of the components of a tourism system, refers to a destination as being composed of:

1. The market (tourists);

2. Travel (transportation);

3. Destination (attractions, facilities, and services);

4. Marketing (information and promotion).

Cooper et al. (1993: 3), analysing Leiper’s model of a tourism system, propose “geographical elements” as: “traveller-generating region, tourist destination region and the transit route region”. Leiper (1979: 397) considers a tourist destination region to be “where the most significant and dramatic aspects occur. It is likewise the location of many parts of the tourist business: accommodation establishments, services, entertainment and recreational facilities”. In fact, Leiper’s model separates the geographical location of a destination from the

[1] “A visitor who does not spend the night in a collective or private accommodation in the country visited”, as stated by Cooper et al. (2008: 75) quoting WTO (2000).

activities developed in the context of tourism. Focusing on a market perspective, Cooper et al. (1993: 77) identify the characteristics of tourism supply as an:

1. Amalgam of facilities, attractions and transportation – so the tourist must be in a place for the service be performed;

2. Destinations are perishable and culturally appraisable.

Buhalis (2000: 98) contextualizes a destination being "defined [as] a geographical region which is understood by its visitors as a unique entity with a political and legislative framework for tourism and marketing planning". According to Buhalis, six main components constitute a destination, i.e. attractions, accessibility, amenities, available packages, activities and ancillary services. Another perspective emerges from Jafari (2000) relating to the destination and its life cycle in terms of touristic development. The author associates a destination with the advanced development of tourism in terms of attractions, number of visitors and economic dependence on tourism.

Moilanen and Rainisto (2009: 112) adopt a definition based on the contributions of Buhalis (2000), Framke (2002) and Murphy et al. (2000), as an "amalgam of tourism products and services, offering an integrated experience to consumers, in a geographical region and physical setting, which its visitors understand as a unique entity". Manente and Cerato (2000) point to the perspectives of a destination in the context of different fields (geography, marketing, economy) and the objectives of various actors. All these fields and actors can give different meanings to a destination. A tourism destination can also be defined as a "Country, region, state, city or place in a geographic space, with its own characteristics of climate, cultural references, infrastructure and services, and with the administrative capacity to develop common instruments of planning that acquire centrality and attract tourists with structured products (…) with a global brand that embraces all those attributes" (own translation, Valls, 2004: 18). These definitions enable the establishment of a detailed conceptual structure, which considers five characteristics for a place to be considered a destination (Valls, 2004):

1. The notion of the homogeneity of place (town, tourist resort, region etc.) that enables setting objectives for common planning and administration;

2. The notion of "centrality" and attraction. A place that is considered worth visiting and is "proposed" by a significant number of visitors;

3. The attractions of resources and the existence of an organized supply of facilities for tourists;

4. The existence of a brand that combines all of the above characteristics, transmitting them in a positive way;

5. The presence of a commercial strategy for the entire destination.

Overall, it is possible to conclude that a destination has multiple definitions; this emphasizes the reference to a common brand and the influence of different users of the place. There is a widespread trend which views a tourism destination as a system composed of traditional economic dimensions of supply and demand.

There is a notion that a tourism system is too complex and dependent not only on the "place of final consumption", where the main activities take place, but on an entire multifaceted process, with a starting point of generating an area to return to it again. Due to these characteristics, tourism destinations have specific management needs. In this context, Valls (2004) makes quite a complete contribution that could help to develop the strategic management of a destination and support the development of marketing policies and instruments.

2.3 THE ROLE OF DESTINATION MARKETING IN A DESTINATION MANAGEMENT ORGANIZATIONS CONTEXT

Discussion of the importance of DMOs is closely linked to the important role of marketing in the context of tourism and the evolution of the different forms of tourism. This perspective takes us to the different roles and challenges that tourism policy and tourism destination management actually face. The discussion will focus on DMOs' marketing activities within tourism destination development, with a starting point in the decades of the 1930s and ’40s, the so-called “mass tourism” or “Fordist tourism” (Fayos-Solá, 1996), going through the changes in post-Fordist tourism until the actual challenges of tourism.

Firstly, it is important to distinguish DMOs from destination marketing organizations. According to Blain et al. (2005: 328) the principal purpose of a DMO is to “market their destination to potential visitors, both individuals and groups, to provide economic benefit to the community and its members”. In contrast, a destination marketing organization is defined by Pike (2005), in Moilanen and Rainisto (2009: 115), as “any organization, at any level, which is responsible for the marketing of an identifiable destination. This therefore excludes separate government departments that are responsible for planning and policy”. From Pike’s (2005) perspective, destination marketing organizations have the responsibility to boost competitiveness, which involves questions of coordination, quality and community participation. It is difficult to distinguish between the two structures although, besides the planning and policy competences of management structures, Pike states that, normally, these structures emerge from government or industry structures. It is possible to find public-private partnerships (PPPs). For Moilanen and Rainisto (2009), it is not clear that DMOs have the task to manage a destination brand.

In the first period, the process of standardization was developed by a number of actors in North America and Europe stating that: “In North America, it was the hotel and airlines that were the key actors in the creation of mass tourism” and “In Europe, the tour operators played the same role as the hotels in North America, likewise offering the consumer a certain degree of security in his/her surroundings, through control over the supply of transport and lodging at [their] destination” (Fayos-Solá, 1996: 406). From the example of earlier decades, it is possible to understand, from supply and demand characteristics, how destination marketing and management organizations play a diminutive role due to the standardization of the offer. The key factor lies in the economies of scale, with little differentiating on the supply side and basic demand motivations, “the management has been similar on both continents, based on marketing identical tourism services for undifferentiated groups of consumers” (Fayos-Solá, 1996: 406). It is to be expected that, due to the characteristics of mass consumption, the focus was on the supply side, trying to satisfy what Urry (2011) calls the "collective gaze" of consumption.

In the 1980s, the literature faced a new paradigm developed by Poon (1993), termed the New Age of Tourism (NAT). This new approach makes the following challenges to the tourism industry and DMOs' practices:

1. New consumers;
2. New technologies;
3. New production practices;
4. New management styles;
5. New frame circumstances.

In this intermediate phase, is possible to recognise new forms of tourism, called the post-Fordist phase, in that it is likely to identify new forms of supply that are more suitable to different tourist motivations and products. This new approach largely hinges on marketing strategies. Calantone and Mazanec (1991) present some of the key areas of intervention of marketing management and tourism, namely strategic marketing planning (portfolio analysis, marketing planning, product positioning, market segmentation), consumer behaviour (forecasting etc.) and product development (advertising).

Facing the new challenges of tourism at the beginning of the twenty-first century, Buhalis (2000: 96) refers to "amalgams of tourist products, offering an integrated experience to consumers", which reinforces the previous discussion on the delimitation of places. He assumes that a destination has a geographical delimitation and political administration in order to facilitate DMOs' operation. This author refers to the limitations of destination marketing as a result of the lack of research, given that what exists is often conducted by consulting services and DMOs with no interest in making known their strategies. In his article, what is made clear is the importance of DMOs in establishing and managing the marketing activities of a tourism destination. In fact, it is assumed that the delimitation of destinations is important in order to make possible the actuation of DMOs in the context of crescent competition, although due to the characteristics of the tourism system it is controversial to assume one single entity with a key role.

In this evolution, a special and contested remark must be stressed. As Fayos-Solá (1996: 410) points out, “the quest of profitability is the driving force of tourism enterprises; securing citizen approval and the ensuing continuity of operations is what motivates Tourism Administrations (TAs). Companies live off their clients; TAs lives off tax-payers. Companies generally compete with one another; TAs are monopolies”. But this important and difficult role has some constraints. For instance, Pike (2005) refers to the importance of destination marketing organizations in relation to developing a brand identity to target different tourist markets, but this author simultaneously states that due to the nature of its structure, i.e. formed by public-private partnerships, they tend to have conflicting interests and often do not have control over brand promises, given the tourism system’s nature.

Blain et al. (2005) stress DMOs’ lack of control over the visitor’s experience, an important role in the distinctiveness of a destination. In this period, the DMOs’ operation involves enlarging their scope, and the question nowadays is trying to offer a more flexible and differentiated offering at the best possible price.

2.4 Destination Competitiveness

The complexity of actors amid the definitions of tourism destination reveals the difficulty in managing the tourism system, and the significance that it embraces among increasingly globalized competition. A key aspect of this global competition is the concept of competitiveness, which is generally defined by the Organisation for Economic Co-Operation and Development (OECD), in terms of a statistical glossary, thus: “Competitiveness is a measure of a country's advantage or disadvantage in selling its products in international markets” (OECD, http://stats.oecd.org/glossary/3 March 2010). Michael Porter (1990) adopted the determining title “The Competitive Advantage of Nations”, where he includes evidence of the well-known “diamond”.

The competitiveness of destinations has been developed in the context of enhancing the residents’ quality of life. One of the main contributions in this area is the work of Ritchie and Crouch (2000, 2003), who created a conceptual framework to analyse the competitiveness of tourism destinations as composed by micro and macro-ambience, highlighting destination management, policy, planning and development. Ritchie and Crouch (2003: 2) define competitiveness by stating that “what makes a tourism destination truly competitive is its ability to increase tourism expenditure, to increasingly attract visitors while providing them with satisfying, memorable experiences, and to do so in a profitable way, while enhancing the well-being of destination residents and preserving the natural capital of the destination for future generations”. An example of applied research is found in Dwyer and Kim (2003), who develop a comprehensive model of destination competitiveness measurement between different countries and industries. More recently, Enrigh and Newton (2005) have enhanced the measurement of competitiveness. These authors study relevant attributes from a relative importance perspective, concluding that their importance is sensible to other variables.

Bahar and Kozac (2007: 61, 62) argue: “In order to have a powerful economy, each destination has to compete with the rest of the others, attract technology-based investments and offer sustainable tourism products and services”. These authors mention that, “It is undoubtedly true that tourist destinations are accepted to be the key component of the tourist system, as in every industry and business, they are also in competition with each other to obtain a greater proportion of international tourism by attracting more international tourists” (Heath and Wall, 1992). Therefore, it is unquestionable that, nowadays, the competition between destinations is central; however, it is not simple to establish the elements of this competition. Are destinations competing for numbers of tourists, over receipts, the form of tourism, internally, externally, in the long or short term? It is difficult to establish such parameters due the lack of comparative data between different destinations and because they vary in their nature, life cycle and location, among other aspects.

Bahar and Kozac (2007) conducted a literature review highlighting the existence of two approaches to the competitiveness field of study. One is related to generating and analysing primary destination qualitative variables that can contribute to overall destination competitiveness. In this approach, these authors include references to such authors as Driscoll, Lawson and Niven (1994), Enright and Newton (2004), Hsu, Wolfe and Kang (2004), Kozak (2002) and Yoon (2002). Variables such as TDI, repeat intention and customer satisfaction are referred to in this scope of analysis. The second approach is related to secondary, quantitative data that might contribute to the overall output position of a destination, quoting the studies of Dwyer, Forsyth and Rao (2002) and Papatheodorou (2002). From this perspective, related variables mainly emerge from the statistics produced by national offices, such as tourist arrivals, occupancy rates and tourism income. In this second approach, based on secondary data, the Travel and Tourism Competitiveness Report 2008, produced by the World Economic Forum, makes a comprehensive contribution to the competitiveness quantification of 130 countries based on 14 dimensions, namely: ”policy rules and regulations; environmental sustainability; safety and security; health and hygiene; prioritization of travel & tourism; air transport infrastructure; ground transport infrastructure; tourism infrastructure; information and communication technologies infrastructure; price competitiveness in the travel & tourism industry; human resources; affinity for travel and tourism; natural resources and cultural resources“ (WEF, 2008: 5). Bahar and Kozac (2007: 63) while recognizing the lack of any sustainable agreement about the variables to include in a destination competitiveness assessment, agree that it is important to measure “primary features” related to natural attractions and “secondary destination features” related to constructed attractions and facilities.

In the context of this discussion about competitiveness, working with both approaches leads to the importance of differentiation, and particularly the role of image in the perception and projection of differentiation. Among marketing strategies, branding or image building is an important aspect as it can help distinguish between different destinations (Nielson, 2003). It is argued that, as a result of the characteristics of tourism destinations, particularly the intangibility and the distance between the local of consumption and the decision to travel, decisions are made by mental representation. In this context, a strong image is fundamental (Nielsen, 2003).

Although it is important to accept that it is not possible to control an image in all its dimensions, given its complex formation with a large range of sources and forces of influence, image really does play an important role in the context of marketing strategies. Destinations can have different images that reflect different marketing and branding strategies. Fyall et al. (2006), in Kozak and Andreu (2006: 73), note, in the context of the competitiveness of tourism, the importance of “tourists’ awareness and familiarity with the destination and the marketing of the destination (…) causing it to be in the consideration set”. These authors stress the importance of “bearing in mind”. King (2002), in the context of the new challenges that tourism faces, underlines the importance of a sound well-built brand image that clearly transmits the values of the destination, along with a clear understanding of “consumers’ needs and motivations, to develop marketing communication channels, to enrich holiday experiences”. Hankinson (2004: 7) notes that, “In an increasingly competitive market therefore, destinations marketers must seek a fuller understanding of the nature of images held by both individuals and organisations in order to build more favourable brand images and thereby enhance a destination’s attractiveness and economic development”. Hankinson (2001) defends this knowledge as important to competing destinations in order to achieve the desired positioning.

It is claimed that, actually, the consumers do not decide merely in terms of the functional benefits of products/destinations, but rather in terms of senses, emotions and experiences. Since the seminal work of Pine and Gilmore (1998) on the experience economy, the importance of the intangible, the experience, has become an important tool of marketing and, more importantly the, “key to competitiveness” (Hundson and Ritchie, 2009: 218). Blain et al. (2005) argue that, due to the importance of destination image regarding destination choice it is important to comprehend the concepts of destination branding, image and competitiveness. To support this statement, these authors conducted an extensive review of the literature in which they point to the importance of image uniqueness and differentiation to seek competitiveness gains.

2.5 Tourism Destination Image: Concepts and Scope

Since the 1970s, TDI has been studied from different perspectives and with different impacts on consumer behaviour theories and destination marketing strategies. The multidisciplinary nature of this theme is studied in different scientific fields, as discussed by Kastenholz (2002), specifically: philosophy (Thayer, 1982; Guba and Lincoln, 1994; Levy, 1982), psychology (Banks and Krajicek, 1991; Lilli, 1983; Eysenck and Keane, 1990), social psychology (Sirgy, 1983; Malhotra, 1981; Santiago, 1996) and the ones referred to by Gallarza et al. (2001), such as anthropology (Selwyn, 1996), sociology (Meethan, 1996) and geography (Gould and White, 1992; Draper and Minca, 1997). Specifically in the marketing field, image is linked to perceptions of products and brands (Kastenholz, 2002) and consumer behaviour, and especially to processes of decision-making.

In the last four decades, TDI has become recognized as an important component of tourism management and development and of destination marketing, attracting several conceptual and empirical approaches. Phelps (1986: 168) highlights the importance of TDI in terms of to “attract people to particular places”. One of the most decisive studies is developed by Hunt in 1975, as recognized by Gallarza et al. (2001), and the conceptual work of Echtner and Ritchie (1991, 1993), which offers one of the first conceptualizations of image components still studied today. Over the last 40 years it has been possible to propose different definitions for TDI. Table 2.1 attempts to synthesize some of these, based on Milman and Pizam (1995), Gallarza et al. (2001), Kastenholz (2002) Tasci and Kozac (2006), and the other authors quoted. The focus is on the various definitions of reference authors between the 1970s and ’90s.

TABLE 2.1 – TOURISM DESTINATION IMAGE CONCEPTS BY DATE AND AUTHOR

Author(s)	Concept
Hunt (1971) quoted in Gartner and Hunt (1987: 15)	“Impressions that a person or persons hold about a state in which they do not reside”.
Oxenfeldt (1974–75) and Dichter (1985), quoted in Baloglu and McCleary (1999: 871, 872)	“Overall or total impression which is formed as a result of the evaluation of individual attributes which may contain both cognitive reactions and emotional content”.
Markin (1974) quoted on Gallarza et al. (2001: 60)	“Our own personalized, internalized and conceptualizing understanding of what we know”.
Hunt (1975: 1)	“Perceptions held by potential visitors about an area”.
Lawson and Bond-Bovy (1977) quoted in Milman and Pizam (1995: 21)	“Expression of all objective knowledge, impressions, prejudice, imaginations and emotional thoughts an individual or a group have of a specific object or place”.
Crompton (1979: 18)	“Sum of beliefs, ideas and impressions that a person has of a destination”.
World Tourism Organization (1979) quoted in Milman and Pizam (1995: 21)	“An aura, an angle, a subjective perception accompanying the various projections of the same message transmitter”.
Dichter (1985,) quoted in Reilly (1990: 21)	“The concept of image can be applied to a political candidate, a product, and a country. It describes not individual traits or qualities but the total impression and entity makes on the minds of others”.
Tourism Canada (1986-1989) quoted in Echtner and Ritchie (1991: 7)	“How a country is perceived relative to others”.
Hunt (1971) quoted in Gartner and Hunt (1987: 15)	“Impressions that a person or persons holds about a state in which they do not reside”.
Richardson and Crompton (1988) quoted in Echtner and Ritchie (2003: 41)	“Perceptions of vacations attributes”.
Calantone et al. (1989) quoted in Echtner and Ritchie (1993: 41)	“Perceptions of potential tourist destinations”.
Embacher and Buttle (1989) quoted in Gallarza et al. (2001: 60).	“Image is comprised of the ideas or conceptions held individually or collectively of the destination under investigation. Image may comprise both cognitive and evaluative components”.
Echtner and Ritchie (1991: 8)	“Not only the perceptions of individual destination attributes but also the holistic impression made by the destination”.

Reynolds (1965) quoted in Fakeye and Crompton (1991: 10).	"An image is the mental construct developed by the consumer on the basis of a few selected impressions among the flood of total impressions. It comes into being through a creative process in which selected impressions are elaborated, embellished and ordered".
Assael (1984) quoted in Fakeye and Crompton (1991: 10).	"Image is the total perception of the destination that is formed by processing information from various sources over time".
Gartner (1993: 193)	"Destinations' images are formed by three distinctly different but hierarchically interrelated components: cognitive, affective and conative. The interrelationships between these components will determine product predisposition".
Kotler et al. (1994) quoted in Gallarza et al. (2001: 60).	"The image of a place is the sum of beliefs, ideas, and impressions that a person holds of it".
Gartner (1993, 1996) quoted in Gallarza et al. (2001: 60).	"Destination images are developed by three hierarchically interrelated components: cognitive, affective, and conative".
Santos Arrebola (1994) quoted on Gallarza et al. (2001: 60).	"Image is a mental representation of attributes and benefits sought of a product".
Parenteau (1995) quoted in Gallarza et al. (2001: 60).	"Is a favourable or unfavourable prejudice that the audience and distributors have of the product or destination".
Milman and Pizam (1995: 21)	"Visual or mental impression of a place, a product, or an experience held by the general public".
Jenkins (1999) quoted in Kastenholz (2002: 128)	"Vague and shifting meanings, used in a large number of contexts and disciplines (…)".
Coshall (2000) quoted in Tasci and Kozac (2006: 304)	"The individual perceptions of the characteristics of destinations".
Ahmed et al. (2006:60,61)	"What tourists think or perceive about a state as a destination, its tourism resources, its tourist services, the hospitality of its host, its social and cultural norms, and its rules and regulations which influence their consumer behaviour".
Bigné et al. (2009: 716)	"[The] overall perception of a destination, the representation in the tourist's mind of what he/she knows and feels about it. In sum, it consists of all that the destination evokes in the individual; any idea, belief, feeling or attitude that tourists associate with the place".

Source: Adapted from Milman and Pizam (1995), Gallarza et al. (2001), Kastenholz (2002), Tasci and Kozac (2006), Echtner and Ritchie (1991), Fakeye and Crompton (1991), Gartner and Hunt (1987), Reilly (1990) and Baloglu and McCleary (1999), with references selected by the author.

This extended author compilation vs. concept table concludes that a unique global concept of destination image is difficult to achieve, because it will always be considered from the perspective of the thematic research or analysis. Grosspietsch (2006: 226) states that “the term image imposes a definition problem”. Echtner and Ritchie (1993: 3) comment that “there really has been limited effort, up to this point, to carefully examine and understand the unique characteristics of this concept”. In general, the contributions available in the literature lead us to conclude that the concept of destination image has a subjective nature, with different dimensions depending on the personal perceptions that the individual has about a place. Young (1999), quoted by Kastenholz, (2002) refers to image concepts that integrate expressions, such as: people/visitors, mental construction, perceptions and impressions and finally the perspective of an industry or agents of tourism. The internalization of image concept as an open and dynamic system is a starting point to operationalize the models that analyse the process of destination image formation.

The research in this field of study impacts on different variables of decision-making and marketing strategies in general. Furthermore, important insights regarding the image-formation process and dimensions are found in Hunt (1975), Gartner (1989, 1993) and Baloglu and McCleary (1999*)* inter alia, on the context of marketing strategies in Calantone and Mazanec (1991), Ahmed (1991) and Baloglu (1997) inter alia, on the relation between image and destination selection in Hunt (1975) and Gartner (1993) inter alia, on destination image thorough some segments of the population in Pearce (1982), Phelps (1986) and Fakeye and Crompton (1991) inter alia, and finally, regarding satisfaction, as proposed by Chon (1990). More recently the focus of research has been related to the construction of structural models that enable us to understand influential variables within consumer behaviour. In these structural models, image is integrated in Lee (2009), Chi and Qu (2008) and Prayag (2009), image representation on the Web by Choi et al. (2007), Frías et al. (2008) and Stepchenkova and Morrison (2006), visual image by Hunter (2008) and image in the context of place branding by Hosany et al. (2006) and Tasci and Kozac (2006).

Table 2.2 presents a list of the main scopes of study, regarding TDI, based on Baloglu and McCleary (1999) Gallarza et al. (2001) and Tasci et al. (2007), and on the current research contributions based on a literature review.

TABLE 2.2 – SCOPE OF DESTINATION IMAGE BY AUTHOR

AUTHOR(S) AND SCOPE OF DESTINATION IMAGE
Conceptualization and dimensions
Hunt (1971, 1975); Gunn (1972); Crompton (1979); Stabler (1988); Gartner (1989, 1993, 1996); Telisman-Kosuta (1989); Ashworth and Voogd (1990); Reilly (1990); Ahmed (1991); Chon (1991, 1992); Echtner and Ritchie (1991, 1993); Valls (1992); Kotler et al. (1994); Bordás and Rubio (1993); Mazanec (1994); Dadgostar and Isotalo (1995); Parenteau (1995); Ahmed (1996); Bramwell and Rawding (1996); Dann (1996); Eizaguirre and Laka (1996); Opperman (1996); Selby and Morgan (1996); Baloglu and Brinberg (1997); Lumsdon (1997); MacKay and Fasenmaier 1997; Walmsley and Young (1998); Baloglu and McCleary (1999), Gallarza et al. (2001).
Destination image formation process
Hunt (1971, 1975); Gunn (1972); Stabler (1988); Gartner (1989, 1993, 1996); Chon (1989, 1990, 1992); Ashworth and Voogd (1990); Ashworth (1991); Fakeye and Crompton (1991); Valls (1992); Bordás and Rubio (1993); Echtner and Ritchie (1993); Ahmed (1996); Dann (1996); Oppermann (1996); Baloglu and McCleary (1999).
Tourism destination image measurement
Hunt (1971, 1975); Gunn (1972); Goodrich (1977); Crompton (1979); Jaffe and Nebenzahl (1984) Sternquist Witter (1985); Haahti (1986); Gartner and Hunt (1987); Stabler (1988); Calantone et al. (1989); Embacher and Buttle (1989); Gartner (1989, 1993, 1994); Min Han (1989); Reilly (1990); Calantone and Mazanec (1991); Ahmed (1991); Echtner and Ritchie (1991, 1993); Fakeye and Crompton (1991); Gartner (1993, 1996); Williams and Clarke (1991); Carmichael (1992); Chon (1992); Cromptone et al. (1992); Driscoll, Lawson and Niven (1994); Amor, Calabuig, Abellán and Monfort (1994); King (1994); Mazanec (1994); Dadgostar and Isotalo (1995); Bramwell and Rawding (1996); Eizaguirre and Laka (1996); Opperman (1996); Baloglu (1997); Baloglu and Brinberg (1997); Borchgrvink and Knutson (1997); Walmsley and Kaom (1999); Walmsley and Young (1998); Baloglu and McCleary (1999); Lohmann and Kaom (1999); Chon (1989), Gallarza et al. (2001).
Destination choice process
Hunt (1975); Gunn (1972); Goodrich, (1977); Moutinho, (1987); Woodside and Lysonski, 1989; Crompton, (1992); Oppermann (1996).

Destination image management strategies: positioning, promotion, competitiveness
Goodrich (1977); Haahti (1986); Calantone et al. (1989); Gartner (1989); Min Han (1989); Telisman-Kosuta (1989); Reilly (1990); Ashworth and Voogd (1990); Echtner and Ritchie (1991, 1993); Ahmed (1991); Ashworth (1991); Guthrie and Gale (1991); Williams and Clarke (1991); Crompton, Fakeye and Lue (1992); Carmichael (1992); Heath and Wall (1992); Kotler et al. (1994); Bordás and Rubio (1993); Gartner (1993, 1996); Prentice and Hudson (1993); Ritchie (1993); Amor, Calabuig, Abbellán and Monfort (1994); Getz (1994); King (1994); Ryan and Montgomery (1994); Eizaguirre and Laka (1996); Ahmed (1996); Bramwell and Rawding (1996); Eizaguirre and Laka (1996); Fesenmaier and Mackay (1996); Oppermann (1996); Schroeder (1996); Selby and Morgan (1996); Baloglu (1997); Alford (1998); Smith and Krannich (1998); Lohmann and Kaom (1999); Ruiz, Olarte and Iglesias (1999); Pike and Ryan (2004).
Image and satisfaction
Chon (1989); O'Leary and Deegan (2005); Prayag (2009); Veasna et al. (2013)
Temporal change
Gartner (1986); Gartner and Hunt (1987); Ashworth and Voogd (1990); Ahmed (1991); Chon (1991); Fakeye and Crompton (1991); Dann (1996); Oppermann (1996); Selby and Morgan (1996).
Image from a supply perspective
Baloglu and Mangaloglu (2001).
Visitor's image and projected image
Stabler (1990).
Image spatial differences
Hunt (1975); Goodrich (1977).
Impacts of conflicts on image
Gartner and Shen (1992).
Tourism destination Image in the context of events
Chalip and Green (2003); Lee et al. (2005); Custódio and Gouveia (2007).
Segments of a population
Sternquist Witter (1985); Prentice and Hudson (1993); Ritchie (1993); Getz (1994); King (1994); Ryan and Montgomery (1994); Parenteau (1995); Alhemound and Armstrong (1996); Eizaguirre and Laka (1996); Schroeder (1996); Lindberg and Johnson (1997); Lawson et al. (1998); Smith and Krannich (1998); Stepchenkova and Morrison (2008); Leisen (2001).
Familiar and unfamiliar influence on destination experience
Crompton (1979); Pearce (1982); Phelps (1986); Friggen (1987); Chon (1990); Ahmed (1991); Fakeke and Crompton (1991); Hu and Ritchie (1993); Milman and Pizam (1995); Dann (1996); Mackay and Fesenmaier (1997); O'Leary and Deegan (2005), Chi and Qu (2008).

Proximity and distance markets
Hunt (1975); Scott et al. (1978); Crompton (1979); Ahmed (1991); Fakeye and Crompton (1991); Ashworth and Voogd (1990); Ahmed (1991, 1996); Dadgostar and Isotalo (1995); Borchgrvink and Knutson (1997).
Country of origin
Chen and Kerstetter (1999); MacKay and Fesenmaier (1997).
Preference and intending or not intending to visit
Mayo (1973); Hunt (1975); Shewe and Frederick (1978); Milman and Pizam (1995); Chen and Kerstetter (1999).
Travel Purpose
Javalgi, Thomas and Rao (1992); Hu and Ritchie (1993).
Destination loyalty (first-time and repeat visitors)
Beerli and Martín (2004); Valle et al. (2006); Chi and Qu (2008); Chi (2012).
Future behaviour
Lee (2009); Prayag (2010).
Visual image
Stepchenkova and Zhan (2012); Rakic (2010).
Destination image and destination branding
Qu et al. (2011); Lim Y. and P. Weaver (2012); Kneesel et al. (2010).
Destination image and sources of information
Suárez (2011); Leung et al. (2011)
Image analysed by socio-demographic variables
Stabler (1990), Um and Crompton (1990), Stern and Krakover (1993), Walmsley and Jenkins (1993); Baloglu (1997); Baloglu and Brinberg (1997); Beerli and Martin (2004); Boo and Busser (2006)

Source: Based on Baloglu and McCleary (1999), Gallarza et al. (2001), Tasci et al. (2007) literature review and references consulted by the author.

From Table 2.2, it is possible to conclude that destination image encompasses the role of the travel destination choice models available in the literature, namely in Moutinho (1987), Woodside and Lysonski (1989) and Crompton (1992), inter alia. Some authors focus their attention on the destination image formation process, such as Hunt (1975), Fakeye and Crompton (1991) and Baloglu and McCleary (1999). In the context of management, and specifically in marketing strategies, Crompton et al. (1992) defend the study of factors that influence the formation of image in order to fit projected images and establish a correct positioning strategy. Image is studied in the context of different segments of the population in order to understand influential factors (e.g. sociological and psychographic characteristics, purpose of travel). The influence of experience on the destination is also one of the fields of study present in Phelps (1986), Chon (1990) and O'Leary and Deegan (2005).

Empirically, Woodside and Lysonski (1989) test a model of destination choice and awareness. Phelps (1986: 168) measures secondary image (pre-visit) in the context of consumer decision-making, while recognizing that "Perception of a place is a highly personal reaction and it is difficult to make satisfactory generalizations". Chon (1990) studied and proposed a model for the role of image in the travel-buying process of tourists/visitors and its effect on levels of satisfaction/dissatisfaction. According to Chon (1990), the satisfaction experienced by visitors is connected with a comparison between expectations (pre-visit or secondary images) and experience (primary image) of the destination visited. Pearce (1982) defends that experience of the destination (visitation) contributes to differentiation, complete and realistic images. Reilly (1990) studied the measurement of tourism image.

Quoting Pike and Ryan (2004: 334), "image is the key construct in destination positioning". These authors stress the importance of analysing perceptions of image on the demand and supply sides (projected image) in order to find a better positioning strategy. Baloglu and McCleary (1999) studied variables and their influence on the overall image and the image's influence on the destination selection process. Baloglu (1997) defends the importance of image assessment in the context of destination differentiation, positioning and, more generally, improving marketing strategies. Pike and Ryan (2004), referring to the importance of image in strategic marketing development, stress the positioning aspect as an extremely important factor in a competitive environment.

More specifically, concerning tourism satisfaction, O'Leary and Deegan (2005) apply Importance Performance Analysis (IPA) methodology, originally developed by Martilla and James (1977), in the context of tourism in Ireland and consider the importance of image to tourists and their satisfaction experiences. Wade and Eagles (2003) employ this methodology in Parks and Protected Areas. Pike and Ryan (2004) apply IPA to destination positioning analysis and the role of affective perceptions. These studies relate to pre/post-image with emphasis on the importance of expectations, stating that the more the primary image fits or exceeds the secondary image, the greater the satisfaction with and confidence in a repeat experience. These authors emphasizes the importance of constantly monitoring the TDI and the necessity to expand marketing strategies and policy reforms according to these evaluations in order to guarantee good performance and redefine strategies in the case of poor results.

Kim and Yoon (2003) stated that destination image is important in order to develop the attractiveness and competitiveness of destination and to understand perceptions and tourists' behaviour. Jenkins (1999: 1) states that destination images "influence a tourist's travel decision-making cognition and behaviour at a destination as well as satisfaction levels and recollection of the experience". Jenkins (1999) highlights the importance of destination image in the context of marketing. Image is important in the context of decision-making and sales. Jenkins (1999: 2), citing MacInnis and Price (1987), refers to how "imagery pervades the whole consumption experience. Before purchase, vicarious consumption may take place through imagery". Jenkins (1999: 2) states that, "Marketers can also use imagery to increase remembered satisfaction and to encourage repeat purchases of holidays".

Taking into consideration that first-time visitors lack knowledge of destinations before they visit, image fulfils two different functions:

- Strong and differentiated destination images are more likely to be chosen by tourists;

- The post-image of a destination influences satisfaction and return intention.

Alcañiz et al. (2009: 715) affirm that, "the initial image can be modified by the holiday experience, and loyalty to the destination will only be strengthened if the tourist's image of it continues to be positive".

Boo and Busser (2006) studied variables' influence on destination image. They conducted a literature review, shown in Table 2.3, which highlights the revisions made, allowing identification of the variables and the different authors who have studied these variables.

TABLE 2.3 – VARIABLES' INFLUENCE ON DESTINATION IMAGE

Variable	Researchers
Visit Intention	Milman and Pizam (1995), Baloglu and McCleary (1999).
Visit experience	Chon (1990), Ahmed (1991), Fakeye and Crompton (1991), Hu and Ritchie (1993), Milman and Pizam (1995), Dann (1996), Baloglu and McCleary (1999).
Distance	Ahmed (1991), Fakeye and Crompton (1991), Baloglu and McCleary (1999).
Purpose of visit	Javalgi, Thomas and Rao (1992), Hu and Ritchie (1993).
Demographic variables	Stabler (1990), Um and Crompton (1990), Walmsley and Jenkins (1992), Stern and Krakover (1993), Baloglu and Brinberg (1997), Baloglu and McCleary (1999a), Kim and Park (2001), Leisen (2001), Beerli and Martin (2004), Boo and Busser (2006).
Information sources	Goodall (1990), Um and Crompton (1990), Fakeye and Crompton (1991), Gartner (1993), Baloglu and McCleary (1999), Kim and Park (2001), Suárez (2011), Leung et al. (2011).
Word of mouth	Baloglu and McCleary (1999).
Familiarity	Hu and Ritchie (1993), Milman and Pizam (1995), Baloglu and Brinberg (1997), Baloglu and McCleary (1999), Prentice and Anderson (2000), Baloglu (2001), Kim and Park (2001), O'Leary and Deegan (2005), Chi and Qu (2008).
Thrill	Kim and Park (2001).
Relaxation/Escape	Baloglu and McCleary (1999), Kim and Park (2001).
Knowledge	Baloglu and McCleary (1999).
Social	Baloglu and McCleary (1999).
Prestige	Baloglu and McCleary (1999).

Source: Boo and Busser (2006: 59) and references consulted by the author.

Demographic variables and information sources, familiarity with and (previous) visit experience of a destination tend to be the most common variables in the context of destination image. The importance of distance cannot be underestimated. Whether it is these or other variables, the main question is the relationship between these visitors/visit data and whether image attributes, if supported by a consistent sample, will allow the researcher to understand which influential variables and specific market segments have more importance for a positive destination image, which will be very useful and important knowledge for image destination managers and planners in order to implement a (better) destination branding strategy.

Milman and Pizam (1995: 21) define image thus: “Destination image may be referred to as the visual or mental impression of a place, a product, or an experience held by the general public”. According to these authors, the suppliers of a destination product want to develop a favourable image in order to boost demand. Gilbert and Houghton (1991) argue that tourists can develop a variety of images in the travel process, namely in relation to the booking process, travel mode, type of holiday or a combination of all these aspects.

Tyagi (1989), in Milman and Pizam (1995: 21), stresses that image is a dynamic element and illustrates this statement by using a metaphor related to baggage-packing:

> “Tourists fill their suitcase with all types of clothes, all sorts of medicines, and bath accessories. However, they use only the ones that the conditions permit. Accordingly tourists carry all sorts of varied images but not all remain alive or meaningful during the trip. The images change as unimagined conditions emerge”.

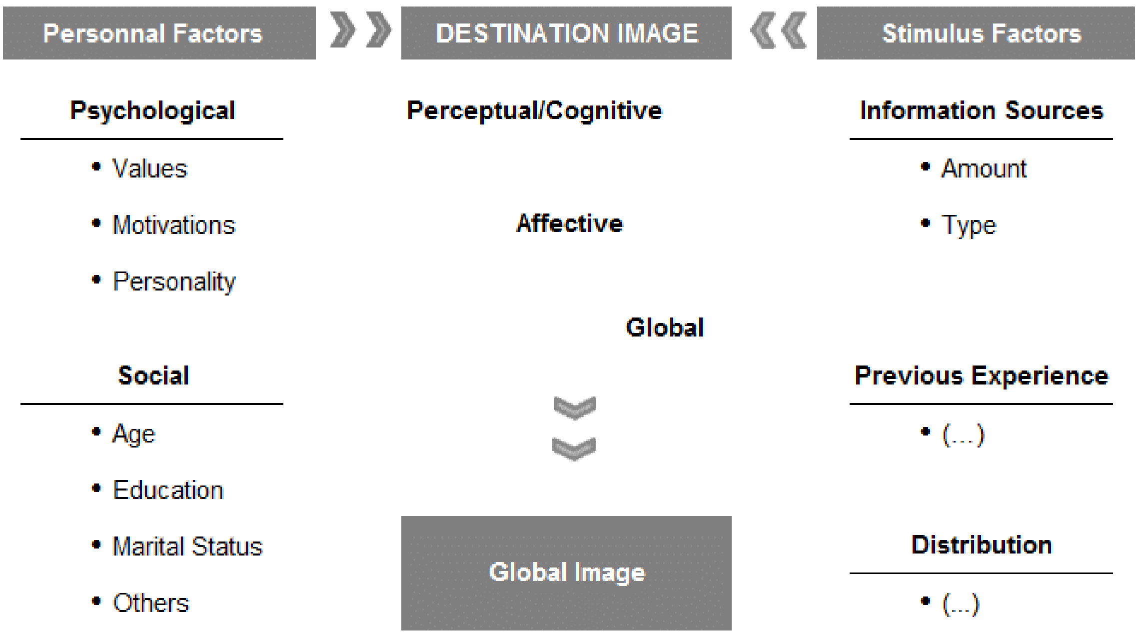
2.6 Models of analysis Relating to the Process of Destination Image Formation

The importance of destination image is present in many travel destination choice models presented in the literature (e.g. Moutinho, 1987; Woodside and Lysonski, 1989, Crompton, 1992). Stern and Krakover (1993) highlight that the global image is the result of different information assimilated in the past and interpreted according to psychological and cultural factors.

Goodall (1990), quoted by Baloglu and McCleary (1999: 869), believes that "knowing [the] factors influencing it would help identify target markets and decide which image should be promoted to which segment of the market". All these authors highlight the modest effort that has been made to understand these factors and the lack of any theoretical conceptual grids.

In the paper *A Model of Destination Image Formation,* Baloglu and McCleary (1999) present an important methodological framework that tries to understand the methodological grid for the process of image formation. This framework, illustrated in Figure 2.1 has made its mark in TDI literature reviews, since it emphasizes and summarizes the two main forces that influence image formation.

FIGURE 2.1 – GENERAL FRAMEWORK FOR THE FORMATION OF DESTINATION IMAGE



Source: Adapted from Baloglu and McCleary (1999: 870).

The framework suggests that image is formed by two forces: personal factors and stimulus factors. Stimulus factors are composed of external forces, such as sources of information and previous experience. Personal factors are related to the psychological and social context of the self. These two kinds of forces lead to a global image that is composed of cognitive and affective dimensions.

Previously, Fishbein and Ajzen (1975) suggested that understanding an individual's beliefs and attitudes plays a part in the process of destination image formation. These beliefs are related to the information the individual possesses about a subject; alternatively, attitudes will be the result of the evaluation, favourable or otherwise, of the subject.

In this context, the same author proposes that attitude has cognitive, affective and conative components, with the first one, cognitive component, being related to tangible aspects of the destination. Gartner (1993), referring to Boulding (1956), describes the cognitive component as comprising images derived from facts. In this context, the measure of external stimulus is extremely important to the formation of a cognitive image. Cognitive perceptions have been mostly analysed in terms of tangible attributes (Pearce, 1982; Custódio and Gouveia, 2007). The second attitude component, affective, relates to feelings about and associations with a destination, mainly along the intangible dimension. Gartner (1993), referring to Boulding (1956), argues that this dimension constitutes the motivation for selecting a certain destination. Walmsley and Young (1998) also studied this component. Finally, conative image, the third component, refers to the intention to or likelihood of visiting a destination within a certain period of time (Pike and Ryan, 2004).

With emphasis on the cognitive and affective dimensions of image, it is interesting to consider its meaning, a discussion which involves the work of several authors:

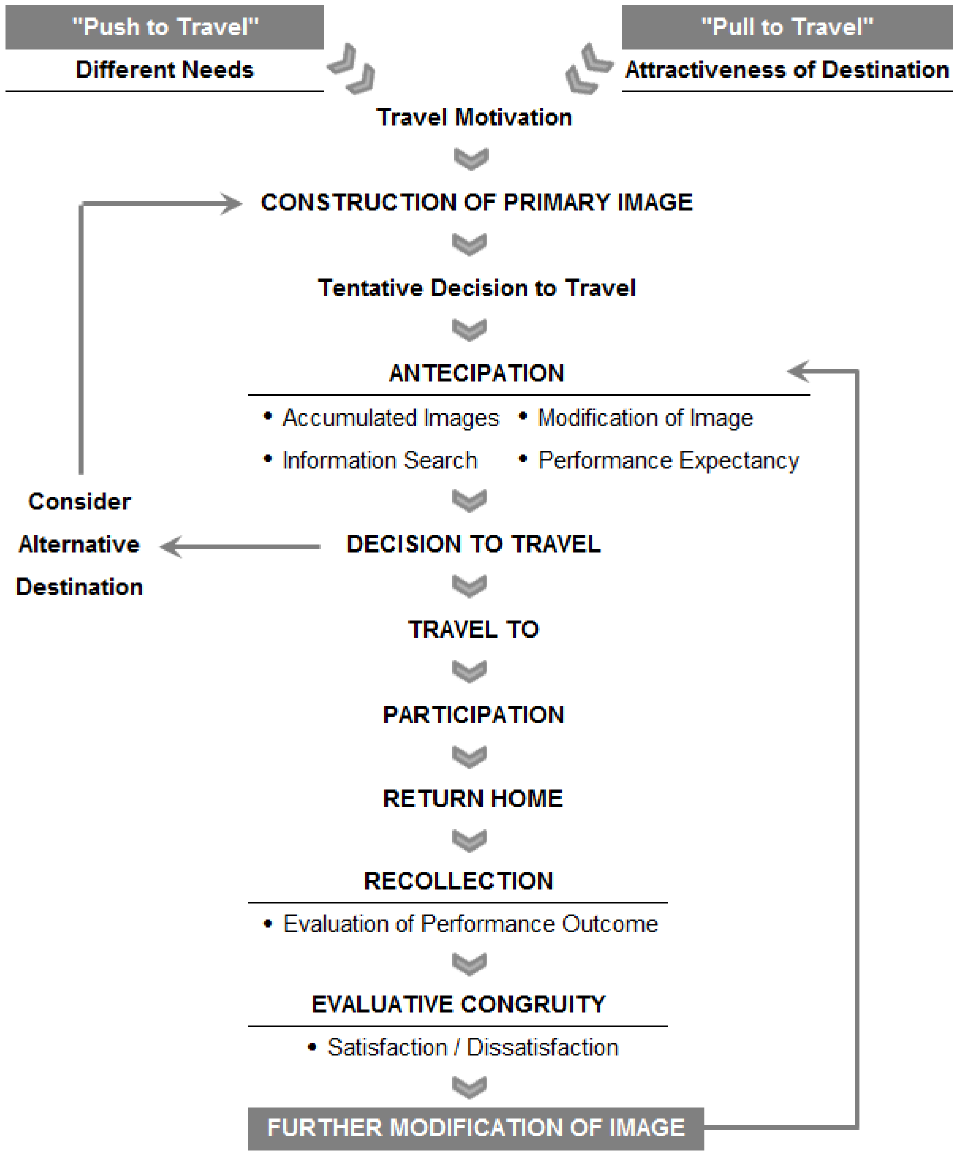
- Moutinho (1987: 11) highlights the concept of perception to understand the cognitive aspect of image. This author assures that "perception is the process by which an individual selects, organizes and interprets stimuli in a meaningful and coherent way. A stimulus is any unit of input affecting any of the senses". Cognition is the process involved, as this information (stimulus) is stored and organized by each individual considering their individual representation of reality. From a tourism perspective, cognition is related to the physical attributes of a destination.

- The affective dimension is associated with feelings and intangible aspects. Gartner (1993: 196), quoting Boulding (1956), refers to how "the affective component of image is related to the motives one has for destination selection. Motives determine what we wish to obtain from the object being considered, thus affecting object evaluation".

In relation to the cognitive dimension, Scott (1965), quoted by Gartner (1993: 193), defines cognitive image as "an evaluation of the known attributes of the product or the understanding of the product in an intellectual way". Boulding (1956), in Gartner (1993: 193), discusses "images derived from fact". In addition, this author states that the amount of external stimulus is crucial to cognitive image formation. The final image is formed at the junction of these two dimensions: the cognitive and the affective. Based on the stimulus discussion, Gartner (1993: 192) debates the sources of information as agents of image formation and highlights image in the context of the destination selection process. To understand this selection process this author defines "internal and external stimulus". "Internal stimulus relate to the recognition of needs not being met at home (push) and external stimuli may result from advertisements or destination (pull)".

Prior to Gartner (1993), Chon (1990), as illustrated in Figure 2.2, argued that the motivation to travel is a push-pull consequence. Push factors are associated with the hierarchy of necessities defined by Maslow in 1943, basic needs being stability and security, love and the desire to belong, esteem and, finally, self-realization. Pull factors are associated with a region's attractiveness. Both sets of factors exist prior to a travel decision. This author defends the primary image being the result of push and pull coexistence.

FIGURE 2.2 – RELATION BETWEEN DESTINATION IMAGE AND TRAVEL PROCESS



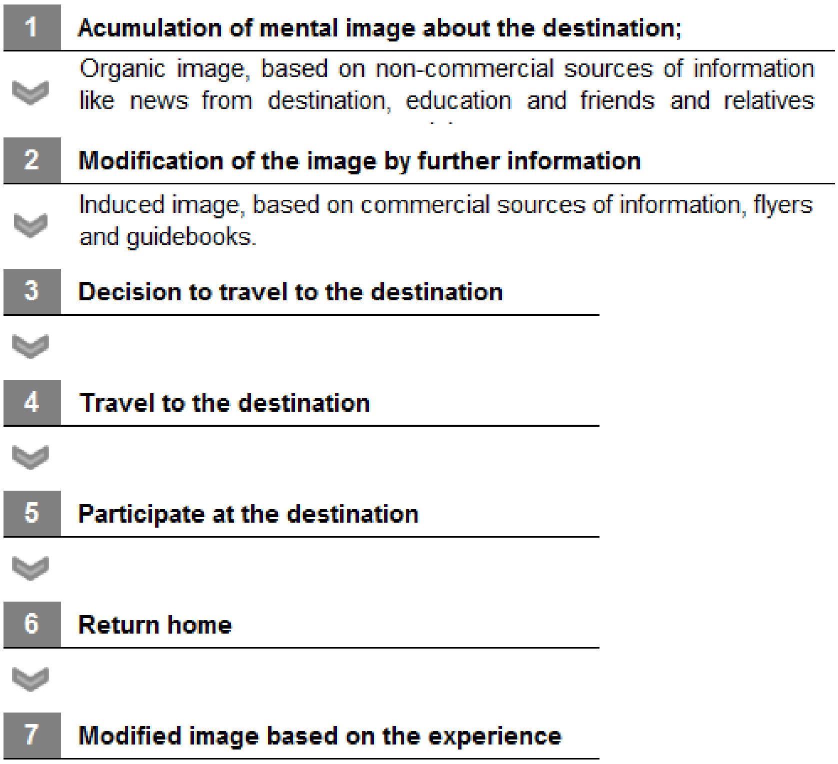
Source: Adapted from Chon (1990: 8).

Chon establishes that, on one hand, positive congruity is a tourist's reasonably positive evaluation of a destination (a positive image of travel experience); on the other hand, positive incongruity results in a highly positive evaluation of a destination (a negative image and a positive experience). Finally, negative incongruity is the most negative evaluation of a destination and is the result of a tourist's positive image and negative experience of a destination. Pearce (1982) defends the view that a visit to a destination tends to contribute to, not only more realistic and complex images of the destination, but also ones that are more differentiated. Chon (1990) considers that the satisfaction experienced by visitors largely depends on the comparisons made between their expectations (preconceived or secondary images) and the reality (primary images) they encounter at their chosen destination. Kastenholz (2002) emphasizes that this conceptual framework relates research on image with travel experience and models of decision-making. In doing so, one considers the rules of cognitive psychology and marketing paradigms, such as communication. The limitations are the non-consideration of personal, socio-demographic variables or, in the context of travel, the purpose and length of stay.

Milman and Pizam (1995: 23) tested the concept of awareness and familiarity and their potential impact on destination image. In this study, they define awareness as “having heard of or recognizing the name of a vacation destination” and familiarity as “having previously visited the destination”. They concluded that those who had previously visited Central Florida (the case study) had a more positive image and a more positive return intention. Conversely, concerning awareness, the respondents who were aware of the destination, Central Florida, did not have a more positive image than those who were not aware. Awareness did not seem to include more interest in visiting Central Florida. As stated by Milman and Pizam (1995: 27), these results are in line with the study of Fesenmaier, Vogt and Stewart (1993), who point out that “awareness may not always lead to an interest in destination or intent to visit it. Awareness results, at best, in curiosity that can lead to interest and eventually to trial”. These results encourage decision-makers to invest in a “range of sales promotion techniques” rather than “advertising techniques”.

In the context of sources of information and image formation agents, Gunn (1988) suggests a theoretical model of image formation based on seven sequential steps. It makes sense as the organic image is transmitted by different sources, until a possibly modified image exists as the result of a visit experience.

FIGURE 2.3 – DESTINATION IMAGE FORMATION PROCESS



Source: Gunn Model adapted from Echtner and Ritchie (1991: 3) and modified by the author.

As shown in Figure 2.3, phases 1 and 2 are characterized by image formation based on commercial or non-commercial sources of information. The last step/phase is characterized by a destination visit. In this model, Gunn furthermore suggests a modified image related to tourists' experiences in/of the destination. The first phase, according to Gunn, is characterized by an organic phase, in which the image is based on non-commercial information. This is the example of media in general (reports, news, newspapers and films about destinations), friends and relatives' opinions. The second phase is based on information absorbed from commercial sources, such as travel brochures and/or guidebooks. This is the induced phase. The organic image may be modified as a result of additional complementary information. After the decision, travel, visit and return, the seventh and final phase, called the visit experience, could result in a modified image. According to Pearce (1982), as the result of a visit, images tend to be more realistic and complex but as well more different. For Phelps (1986), both organic and induced images relate to images before experience of the destination. He terms this secondary image. On the other hand, primary image results from experience at/of the destination – a complex image or one that is modified.

Mansfeld (1992) points to organic and induced images as informal and formal images. This author highlights the influence of these different images on destinations' control of image projection: it is null or almost null in organic images and endogenous in induced images. Mansfeld establishes a model that compares the relation between organic, induced and modified images based on a destination visit. Jenkins (1999: 2), referring to the work of Stabler (1988), comments that destination image is formed by demand and supply factors that influence the consumer's view. Demand is connected to organic factors according to Gunn's model, and supply with induced image. Gartner and Hunt (1987) state that it is difficult to change a negative image, and simultaneously, point out that the creation of a positive image is a slow and complex process. These authors admit that image remains relatively stable over time. This last statement is relatively consensual in the literature, e.g. Crompton (1979) and Fakeke and Crompton (1991), inter alia, suggest that even if destination managers produce considerable improvements in destination attributes, it is difficult to change image in a fast way. Gartner and Hunt (1987) studied Utah as a destination over 12 years and concluded that publicity could influence a positive image, although the decisive factor of destination image modification is whether visitors have already visited the destination or not.

O'Leary and Deegan (2005: 214) conclude that "images form the basis of the evaluation or selection process and thus provide the link between motivations and destination selection"; when prices are similar, destination image tends to be a decisive factor of a destination or holiday choice. To summarize this discussion about sources of information, Table 2.4 presents a framework devised by Gartner (1993), who suggests a model that uses the criterion of image-formation agents.

TABLE 2.4 – IMAGE FORMATION BASED ON SOURCES OF INFORMATION

Source of Information	Content
Overt Induced I	Based on traditional publicity on/in television, radio, the press and the Internet. The cost and exposure depend on the medium. Normally, it is low credibility and high market penetration.
Overt Induced II	Based on tour operators' information, travel agencies and organizations that have an interest in the decision process. Fulfils the function of channels of communication and sources of information. Has high credibility and low market penetration.
Covert Induced I	Information about a destination transmitted by opinion leaders, normally people with awareness and credibility. It is similar to traditional publicity (Overt Induced I) but recommended by a known person in the market segment. It is more credible than overt induced.
Covert Induced II	Image projection through travel writers and media with a special interest in the subject without highlighting destination promoters. Credibility is high and the cost is lower than Overt Induced I and Covert Induced I, although penetration is lower.
Autonomous	Independent reports, documentaries, films and articles. Normally, it is not possible to have control of the projected image. Generally, the news has positive impact due to credible presentation. These kinds of agents have strong credibility and market penetration, so they are powerful agents of image formation.
Unsolicited organic	Normally, this is based on personal communication. Assimilation is generally low and credibility is dependent on the source but normally higher than Overt Induced I.
Solicited organic	Based on word-of-mouth transmission between friends and relatives. Normally these agents have greater credibility.
Organic	Based on information acquired at the destination through a previous visit. It has high credibility.

Source: Gartner (1993:197-205)

Gartner (1993) suggests a grid that identifies different sources of image information, or agents, and the impact in terms of credibility, market penetration and cost for the destination, as shown in Table 2.5.

TABLE 2.5 – IMAGE FORMATION BASED ON SOURCES OF INFORMATION, CREDIBILITY, MARKET PENETRATION AND DESTINATION COST

Image Formation			
Image-change Agent	**Credibility**	**Market Penetration**	**Destination Cost**
Overt Induced I Traditional forms of advertising (e.g. brochures, TV, radio, print, billboards, ...).	Low	High	High
Overt Induced II Information received from tour operators, wholesalers.	Medium	Medium	Indirect
Covert Induced II Second party endorsement through apparently unbiased reports (e.g. newspaper, travel-section articles).	Low/Medium	High	High
Autonomous News and popular culture: documentaries, reports, news stories, movies, television programmes.	Medium	Medium	Medium
Unsolicited Organic Unsolicited information received from friends and relatives.	High	Medium/High	Indirect
Solicited Organic Solicited information received from friends and relatives.	Medium	Low	Indirect
Organic Actual visit.	High	...	Indirect

Source: Gartner (1993: 210)

It is possible to conclude from Table 2.5 that commercial sources of information have a stronger impact in terms of market penetration, although they have low or medium credibility. On the other hand, non-commercial sources of information may have an indirect cost for the destination, as they are not controlled by it.

Kastenholz (2002) summarizes this question in terms of the impact on destination image of different sources of information according to the commercial or non-commercial nature of the source of information.

TABLE 2.6 – IMPACT OF DIFFERENT SOURCES OF INFORMATION ON DESTINATION IMAGE

Type of Information	Type of source			Impact on Image
	Non-commercial	Direct	Personal	
Personal experience	X	X	X	Very High
Personal experiences of others via interpersonal communication	X		X	High
Experience descriptions via the media	X			Medium High
Promotion through interpersonal communication			X	Medium
Promotion through the media				Low

Source: Adapted from Kastenholz (2002:146)

It is conceivable to deduce, as Table 2.6 shows, that commercial sources of information have a lower impact when compared with non-commercial sources of information. In the specific case of experiences via media description, organic sources of information of an autonomous nature have a high-medium impact. This factor is more important when the destination organizes initiatives for large media coverage impact, e.g. events, ones that potentiate the formulation/transmission of images via the media and that occur in a context where the destination as no control over the projected images. Despite the lack of information regarding the impact of the Internet as a source of information on TDI, more recently, Li et al. (2009: 45, 46) have highlighted the importance of this marketing communication channel, referring to tourism being number one in terms of “online transactions”, noting that the “effect of the Internet on image development remains unclear”. These authors conclude that an online search results in an affective destination image improvement maintaining the cognitive destination image.

In summary, it is possible to deduce that two important aspects constitute the image formation process:

- First, it suggests that individuals may have a destination image even if they have never visited it;
- Secondly, and considering that there are differences between the images before and after visiting, it could be important to adopt different promotional messages according to the phase and type of image. With this double framework, opportunities and threats, strengths and weaknesses, should be considered in the design of promotional strategies.

2.7 Destination Image Measurement

After the identification and discussion of destination image definitions, models of analysis for TDI formation and sources of information that participate in this process, the next step is to understand the instruments that allow the measurement and monitoring of that image. As an *ex ante* condition, it is important to highlight that "the way in which destination image is defined and conceptualized will obviously affect the measurement of that image" (O'Leary and Deegan 2005: 216).

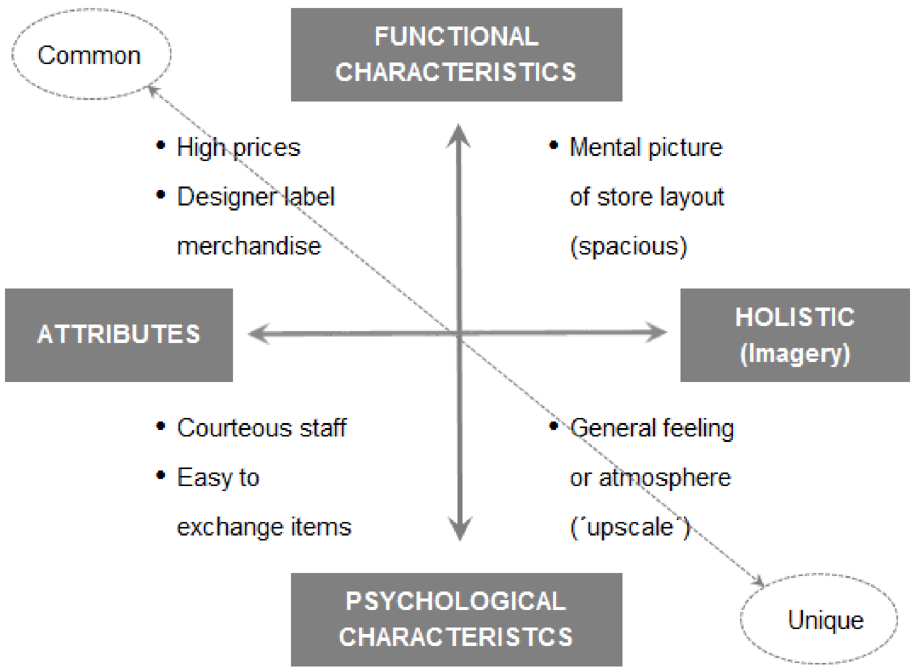
Gallarza et al. (2001) differentiate between empirical studies that do not develop a theoretical framework and focus on statistical analysis and those on the theoretical side whose studies focus on image-measurement problems and develop conceptual grids and their own methodologies, in which Echtner and Ritchie (1993) is an unavoidable reference. Previously, Echtner and Ritchie (1991) developed a measurement grid, presented in Figure 2.4, for image based on three main axes of analysis:

- Holistic attributes: bases humans' ability to process information on psychology and consumer behaviour;

- Functional-psychological: the destination is formed in the separation between functional aspects of the image (tangible aspects) and less tangible aspects which are more difficult to observe (psychological);

- Common-unique: highlights the idea that destination images can fluctuate between perceptions based on “common” characteristics (e.g. level of prices, transport, infrastructure and climate) and those based on “unique” characteristics (hospitality, security, fame and quality of service, amongst others);

FIGURE 2.4 – COMPONENTS OF DESTINATION IMAGE



Source: Adapted from Echtner and Ritchie (1991: 6).

Jenkins (1999: 5) assures that “the failure of most studies to address the holistic components of destination image is related to the methods used by researchers”. Carmichael (1992), in Gallarza et al. (2001), states that the specificities of destination image make its measurement a methodological challenge. These authors classify studies of destination image measurement as versatile.

With a strong focus on enquiries, the review of literature regarding the techniques used to measure destination image underlines two main methodological approaches: structured and non-structured methodologies. In structured methodology, the different attributes of destination image are integrated in a standardized way, normally via a questionnaire using a semantic differential or Likert scale. Normally, Likert scales are used to measure cognitive evaluations (very good to very bad) and a differential scale is used to measure affective components (exciting to boring). Typically, it is possible to calculate a profile rating for this image based on the opinions of respondents. This type of methodology is simpler to administer and code, and the results can be treated and analysed using powerful statistical analysis. These kinds of methodologies facilitate comparisons between destinations (global and by attribute). A disadvantage relates to the lack of flexibility: forcing respondents to think about the destination from an attribute perspective, in a more general way, omitting particularities and unique characteristics of the destination. The consistency of the methodology can be highly variable, depending on the procedures used to select the attributes of image included in the scales. These scales should include functional and psychological characteristics.

In contrast, unstructured methodologies are an alternative way to measure and are used in destination image research. According to Echtner and Ritchie (1991), citing Boivin (1986), these methodologies are free forms of image description to measure image. In unstructured methodologies, the destination attributes are not identified. Visitors are asked to describe the destination in answering to open-ended questions or focus groups, depending on the research objective. In this method, the results depend on content analysis and methods of categorization that enable the construction of image dimensions. This methodology allows the detection of affective or cognitive dimensions of the image, and for some authors this methodology can be more effective for measuring the holistic and unique aspects of a destination. According to Kastenholz (2002) the limitations of this method relates to the level of detail achieved, which is variable, as it depends on the interviewee's verbal skills, the statistical analysis is restricted and it is difficult to compare destinations.

Jenkins (1999: 6) summarizes the differences between the structured and unstructured methods used to measure TDI (Table 2.7):

TABLE 2.7 – METHODS IN DESTINATION IMAGE RESEARCH: STRUCTURED VS. UNSTRUCTURED

	Structured	Unstructured
Description	Various common image attributes are specified and incorporated into a standardized instrument and respondents rate each destination according to each of the attributes, resulting in an "image profile".	Respondents are allowed freely to describe their impressions of the destination. Data are gathered from a number of respondents. Sorting and categorization techniques are then used to determine "image dimensions".
Techniques	Usually a set of semantic differential or Likert-type scales.	Focus groups, open-ended survey questions, content analysis and repertory grid.
Advantages	- Easy to administer. - Simple to code. - Results are easy to analyse using sophisticated statistical techniques. - Facilitates comparisons between destinations.	- Conducive to measuring the holistic components of destination image. - Reduces interviewer bias. - Reduces the likelihood of missing important image dimensions or components.
Disadvantages	- Does not incorporate holistic aspects of image. - Attribute-focused, i.e. it forces respondents to think about product image in terms of the attributes specified. - The completeness of structured methods can be variable – it is possible to miss dimensions.	- The level of detail provided by respondents is highly variable. - Statistical analysis of the results is limited. - Comparative analyses are not facilitated.

Source: Jenkins (1999: 6)

It may be concluded that amongst unstructured items the most common techniques are related to content analysis. This is a technique that is connected with documental information (e.g. guidebooks or visual information). Content analysis can also be useful to analyse interviews or focus groups. According to Jenkins (1999), the quality of the results of these methods depends largely on the categorization methods employed. Free elicitation methods are described as word association. According to Reilly (1990: 22) "the main advantages of free elicitation for destination image research is that it allows the respondent to describe the target stimulus in terms that are salient to the individual rather than responding to the researcher's predetermined image dimensions". It involves image weaknesses and forces. Triad elicitation involves the consecutive presentation of groups of three elements, which are usually place names, and separates one from the other two in order to aggregate similar ones. Photo-elicitation is like an interview conducted with images (Jenkins, 1999).

In relation to structured methods, it is more common to use a list of pre-determined attributes that are commonly ranked using five or seven point Likert or semantic differential scaling techniques. A Likert scale and a semantically differential scale are very common in studies of destination image measurement and relatively easy to use. For this reason, it is more common to find articles and research projects that use a structured methodology to measure destination image. Affective image is not explored so much in studies of destination image, mostly due to the difficulty in measuring it.

Kastenholz (1997), quoted by Kastenholz (2002), highlights the difficulty of open-ended questions in a study related to rural tourism. In this research, she recognizes that open-ended questioning is conducive to stereotypes due to the focus on a reduced number of dimensions. Using both methods, Likert scale and open-ended questions, she found that some of the attributes figuring strongly on a Likert scale, in terms of importance and presence in the destination, were not mentioned in open-ended questions. For this reason, Echtner and Ritchie (1991) recommend a first phase of research in the enquiry construction, e.g. qualitative research, a focus group or other forms of research to collect a complete list of attributes that are relevant and salient to the destination.

To identify a list of attributes used in a total of 14 research studies, the Table 2.5 was developed by Echtner and Ritchie (1991) for destination image measurement, in which the attributes range from functional to psychological.

FIGURE 2.5 – LIST OF ATTRIBUTES USED TO DEVELOP AN ITEMIZED SCALE

FUNCTIONAL (physical, measurable)

Number of Studies Measuring the Attribute
(Total number of studies referenced is 14)

	Classes			
	1 - 3	**4 - 6**	**7 - 10**	**11 - 14**
Scenery/Natural Attractions				13
Costs/Price Levels			9	
Climate			8	
Tourist Sites/Activities			8	
Nightlife and Entertainment			8	
Sports Facilities/Activities			8	
National Parks/Wilderness Activities			7	
Local Infrastructure/Transportation			7	
Architecture/Buildings			7	
Historic Sites/Museums		6		
Beaches		6		
Shopping Facilities		5		
Accommodation Facilities		5		
Cities		4		
Fairs, Exhibits, Festivals	2			
Facilities for Information and Tours	1			
Crowdedness		4		
Cleanliness		4		
Personal Safety		4		
Economic Development/Affluence	3			
Accessibility	2			
Degree of Urbanisation	1			
Extent of Commercialisation	1			
Political Stability	1			
Hospitality/Friendliness/Receptiveness				11
Different Customs/Culture			7	
Different Cuisine/Food and Drink			7	
Restful/Relaxing		5		
Atmosphere (Familiar versus Exotic)		4		
Opportunity for Adventure	3			
Opportunity to Increase Knowledge	2			
Family or Adult Oriented	1			
Quality of Service	1			
Fame/Reputation	1			

PSYCHOLOGICAL (abstract)

Source: Adapted from Echtner and Ritchie (1991:10)

Echtner and Ritchie (1991) classify the attributes from a functional perspective, highlighting scenery and natural attractions and a psychological dimension whereby they point to the reputation of a destination being an intangible attribute. The scenery and hospitality/friendliness are the most common attributes, present in 13 of the 14 studies. A similar work was made later by Gallarza et al. (2001), who identify the most common attributes used in 25 studies based on structured methodologies, as shown in Table 2.8.

TABLE 2.8 – LIST OF ATTRIBUTES MOSTLY USED IN STUDIES OF DESTINATION IMAGE MEASUREMENT

	Attributes																				
Authors	Variuos activities	Landsape, surroundings	Nature	Cultural attractions	Nightlife and entertainment	Shopping facilities	Information available	Sport facilities	Transportation	Accommodation	Gastronomy	Price, value, cost	Climate	Relaxation vs Massification	Accessibility	Safety	Social interaction	Resident's receptiveness	Originality	Service Quality	**Total**
	Functional																			Psychological	
1. Crompton (1979)									✓			✓	✓	✓		✓			✓		6
2. Goodrich (1982)		✓		✓		✓		✓		✓	✓			✓				✓			8
3. Stemquist (1985)		✓		✓	✓	✓		✓		✓	✓			✓				✓			9
4. Haahti (1986)		✓	✓	✓	✓			✓				✓		✓	✓			✓	✓		10
5. Gartner and Hunt (1987)		✓	✓					✓		✓			✓					✓			6
6. Calantone et al. (1989)	✓	✓		✓		✓		✓	✓			✓		✓		✓		✓			10
7. Gartner (1989)		✓	✓	✓	✓			✓										✓			6
8. Embacher and Buttle (1989)	✓	✓		✓							✓	✓	✓		✓		✓				8
9. Guthrie and Gale (1991)	✓				✓		✓	✓		✓	✓	✓		✓	✓		✓	✓		✓	12
10. Ahmed (1991)		✓	✓	✓	✓	✓		✓					✓					✓			8
11. Chon (1991)		✓	✓	✓		✓			✓	✓	✓	✓			✓	✓		✓	✓		12
12. Fakeye and Crompton (1991)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓			16
13. Crompton et al. (1992)	✓		✓		✓							✓	✓		✓		•	✓	✓		9
14. Carmichael (1992)	✓											✓			✓			✓			4
15. Chon (1992)	✓	✓		✓		✓		✓		✓	✓			✓	✓			✓			10
16. Echtner and Ritchie (1993)		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	19
17. Driscoll et al. (1994)	✓	✓		✓	✓	✓						✓	✓		✓	✓	✓	✓	✓		12
18. Dadgostar and Isotalo (1995)			✓	✓	✓	✓	✓	✓		✓	✓			✓			✓				9
19. Muller (1995)		✓		✓	✓	✓				✓	✓	✓	✓	✓	✓	✓		✓			12
20. Eizaguirre and Laka (1996)						✓			✓	✓	✓		✓		✓	✓		✓			8
21. Schroeder (1996)		✓	✓	✓	✓	✓		✓		✓	✓	✓		✓			✓	✓			12
22. Ahmed (1996)		✓	✓	✓	✓			✓										✓			6
23. Oppermann (1996a, 1996b)		✓		✓	✓				✓	✓	✓	✓	✓			✓				✓	10
24. Baloglu (1997)		✓	✓	✓	✓	✓		✓	✓	✓	✓	✓				✓		✓	✓		13
25. Baloglu and McCleary (1999)		✓		✓	✓	✓	✓			✓	✓	✓	✓			✓		✓			11
Total	8	19	12	19	16	15	4	15	8	15	15	16	12	12	12	10	7	21	7	3	
Sub-total by group	Functional: 131										Psychological: 112										

Source: Adapted from Gallarza et al. (2001: 63).

According to these authors (Gallarza et al., 2001; Echtner and Ritchie, 1993), TDI measurement can be an important tool in promotion strategies. Holistic and unique images can be helpful to seek a better understanding of whether a destination is differentiated and/or stereotyped/categorized. The imaginary is an important tool in the context of publicity, especially television and the press, which is based on images. Campaigns should be monitored to help understand their impact on image and complemented by item-scale attributes for a better understanding of the difference between destinations and, as a result, better management of destination competitive advantages.

Table 2.9 summarizes different methodologies applied by destination image authors in diverse case studies.

TABLE 2.9 – DESTINATION IMAGE MEASUREMENT BY AUTHOR AND METHODOLOGY USED

Author(s)	Case Study	Methodology/Method
Hunt (1975)	To measure the images of four states: Utah, Montana, Colorado and Wyoming.	Structured - 20 attributes; - 7- and 5-point semantic differential scale.
Crompton (1977)	To measure the image of Mexico.	Structured - 18 attributes; - 7-point semantic differential scale.
Goodrich (1977)	To measure the image of nine destinations: Florida, Hawaii, Mexico, California and five Caribbean Islands.	Structured - 30 attributes; - 7-point semantic differential scale.
Crompton (1979)	To measure the image of Mexico in some of the United States.	Structured - 30 attributes; - 7-point semantic differential scale.
Pearce (1982)	To measure and compare pre and post-travel images of seven countries.	Structured - 13 attributes; - 6-point Likert scale.
Haahti and Yavas (1983)	To measure the image of Finland (12 countries included in the survey).	Structured - 10 attributes; - 9-point Likert scale.
Crompton and Duray (1985)	To measure the image of Texas (while testing alternative approaches to importance-performance analysis).	Structured - 28 attributes; - 5-point semantic differential scale.

Kale and Weir (1986)	To measure the image of India.	Structured - 26 attributes; - 7-point Likert scale.
Phelps (1986)	To measure pre and post-travel images of Menorca.	Structured - 32 attributes; - Checklist of attributes.
Tourism Canada (1986–1989)	To measure the image of Canada in various major tourism generating markets.	Structured - 29 attributes; - 5-point Likert scale.
Gartner and Hunt (1987)	To measure the change in Utah's image over a 12-year period.	Structured - 11 attributes; - 5-point semantic differential scale.
Richardson and Crompton (1988)	To explore differences in images held of USA and Canada between French and English Canadians.	Structured - 10 attributes; - 4-point comparative scale.
Gartner (1989)	To measure the images of four states: Utah, Montana, Colorado, and Wyoming (using multidimensional scaling techniques).	Structured - 15 attributes; - 5-point Likert scale.
Calantone et al. (1989)	To measure the images of eight Pacific Rim countries held by tourists from various countries of origin.	Structured - 13 attributes; - 7-point Likert scale.
Reilly (1990)	To measure the image of Montana.	Unstructured - Open-ended questions.
Ahmed (1991)	Components of Utah image.	Structured - 22 attributes; - Bipolar adjectives, Likert-type scale.
Fakeye and Crompton (1991)	Analyse three stages of destination image evaluation of prospective, first-time and repeat visitors about the Lower Rio Grande Valley.	Structured - 32 items; - 7-point Likert scale; Unstructured - Interviews; - Literature search; - Panel of experts.
Chon (1991)	Study how TDI and perceptions are modified and enhanced through visiting the destination.	Statements dealing with respondents' perceptions on a 7-point scale.
Echtner and Ritchie (1993)	To understand image concept and test a methodology to measure destination image.	Structured Statements dealing with respondents' perceptions of destination on a 5-point scale; Unstructured -Open-ended questions; - Focus groups; - Literature search.

Milman and Pizam (1995)	Analyse if consumer awareness of and familiarity with Central Florida as a destination had an impact on image and return intention.	Structured - 70 attributes; - 6-point Likert scale; Unstructured - Focus groups; - Open-ended questions.
Baloglu (1997)	Destination image variations of USA based on socio-demographic and trip characteristics.	Structured - 34 image items; - 5-point Likert scale.
Baloglu and McCleary (1999)	Factors influencing TDI in relation to Turkey, Greece, Italy and Egypt.	Structured - 14 image items; - 4 bipolar scales to measure affective image; - 5-point Likert scale Unstructured - Literature review; - Content analysis.
Reilly (1990), Dann (1996), Embacher and Buttle (1989), Echtner and Ritchie (1993)	-	Free elicitation/ Open-ended questions.
Amor et al. (1994), Driscoll et al. (1994), Uthrie and Gale (1991), King (1994), Fakeye and Crompton (1991)	-	Focus groups.
Haahti (1986), Amor et al. (1994), Selby and Morgan (1996), Bramwell and Rawding (1996), Fakeye and Crompton (1991)	-	In-depth interviews/ discussions with experts.
Goodrich (1982), Reilly (1990), Haahti (1986), Embacher and Buttle (1989), Echtner and Ritchie (1993), Fakeye and Crompton (1991)	-	Content analysis of promotional material and previous results.
O'Leary and Deegan (2002)	The image of Ireland from the perspective of French visitors.	Structured - 18 attributes; - 5-point Likert scale; Unstructured: - Content analysis; - Free elicitation.
Alcañiz et al. (2009)	Image composition and its influence on overall image and future behaviour intentions.	Structured - 24 attributes; - 5-point Likert scale; Unstructured: - Focus group.

Kim and Yoon (2003)	TDI structure.	Structured - 11 attributes; - 5-point Likert scale.
Boo and Busser (2006)	Influential variables in destination image.	Structured - 15 items of semi-affective image; - 9 items of pure-affective image - 5-point Likert scale; Unstructured: - Literature review.

Source: Adapted from Echtner and Ritchie (1991), Echtner and Ritchie (1993), Gallarza et al. (2002) and references consulted by the author.

It is possible to claim that research on destination image has privileged structured methodologies, with some few exceptions. As an example, Reilly (1990) applied open-ended questions to help the respondents, in their own words, formulate images about the state of Montana. The author suggests in the survey: "What three words best describe the County (...) as a destination for holidays?" The results express references to the scenery, openness, mountains, temperature and the big blue sky.

2.8 DESTINATION BRANDING

Destination branding literature is a recently emerging field of discussion and knowledge. According to Pike (2005: 258), "the first academic conference session convened in 1996, the first journal articles appearing in the late 1990s, and the first book published in 2002". Blain et al. (2005) highlight the "Travel and Tourism Research Association's Annual Conference" in 1998 as marking the start of the destination branding issue and the *Journal of Branding Management* in 2002, with contributions from authors like Hall, Harrison, Kotler and Gartner, Morgan, Prichard and Pride. According to Pike (2005: 258), "never before has it been more important for a destination to develop an effective brand".

Kavaratzis and Ashworth (2005: 506) refer to the importance of place branding as places "need to differentiate themselves from each other, to assert their individuality in pursuit of various economic, political or socio-psychological objectives". Hankinson (2001: 129) regarding the lack of research on place branding, points out that, "This is in contrast to the increasing evidence in the press that branding, at least as a concept, is increasingly being applied to locations". Blain et al. (2005: 328) agree and emphasize that, "our knowledge of destination branding remains poorly understood and is often misunderstood by practitioners". Kavaratzis and Ashworth (2005: 508) agree that place branding is not "a synonym for a single catchy slogan, however much this might embody the aspirations of the city authorities (…). Slogans and logos (…) are not the strategy itself". According to Hankinson (2004: 6), "the recognition by marketers that branding can make an effective contribution to the economic development of places such as towns and cities is now well established". As a remarkable statement for the current issue and research, this author defends the main developments in this field are in tourism marketing, which considers places as destinations.

In this context, what is the (important) role of marketing and branding? The importance of marketing in the context of tourism destinations has multiple contributions. Middleton (1994: 117) refers to "selecting strategies, developing marketing plans, putting plans into action, and evaluating effectiveness". Ashworth and Goodall (1995) and Middleton (1994) explore the relation between marketing and the tourism industry. In this context, Moilanen and Rainisto (2009) contextualize the specificities of destination brand regarding a fragmented industry. Hankinson (2007: 241) reinforces the difficulty in managing the branding of places due to the "distinctive nature of the place product". Pedersen (2004: 78) states that, "Place branding is about strengthening the legibility of a location. As such, it is about marketing. Yet, while being a sort of marketing, place branding is driven by an explicit intention (...) to transcend the limitations of marketing".

Therkelsen and Halkier (2008: 161) refer to the nature of places leading to a need to combine different offers, stakeholders and populations into a place branding strategy, generally "settling on a common strategy that considers all stakeholder's interests and which meets the criteria of relevance for targeted place consumers and differentiation from competing places". Moilanen and Rainisto (2009) explore destination brand in the context of other brand strategies, namely brand alliance, umbrella brand and corporate branding, and they conclude that these concepts require different management skills. For these authors, destination brand is a network brand composed of companies that form the tourism supply.

Keller (2003) refers to an umbrella brand being used when a brand wants to create a common association with a range of product categories. Other authors use family brands and range brands. Kerr (2006: 279) introduces the term brand portfolio as “The portfolio of brands examines the use and associations of brands and alliances, by way of tactics such of placement, sponsorship and events”. The linkages between brands are important to achieve efficiency and benefits as well as to avoid damaging relationships”. Kerr (2006: 279) notes that a corporate brand “contributes to the images held of the organisation by all its stakeholders, including employees, customers, investors, suppliers, partners, regulators, special interest groups and local communities”. Kavaratzis and Ashworth (2005), in Therkelsen and Halkier (2008: 161), make a comparison between place branding and corporate branding. For these authors, both concepts deal with “multidisciplinary nature, along with numerous stakeholders, they are both characterized by being highly intangible and complex, social responsibility is an important issue for both fields, and both have multiple identities to consider”.

Kavaratzis and Ashworth (2005: 507) argue that place marketing is related to the “construction, communication and management of the city’s image because, at its simplest, encounters between cities and their users take place through perceptions and images” and “people encounter places through perceptions and images”. This last statement offers evidence for the relation between marketing and the specific dimension of image. These authors propose that if marketing is oriented to consumers’ needs and wants, then it is necessary to know what the main users of the space (in the case the residents) think about the place, what their perceptions are. Metaxas (2009: 1372) states that place marketing is “a strategic process based on the strategic development planning of a place. Place marketing requires knowledge, critical thinking and strategic analysis”. Anholt (2010: 11) believes that “place branding is not about communication but about policy change” and “places have images just as products and corporations have images, and that places depend to a similar extend on the power and appeal of those images for their progress and prosperity. However, there is a big difference between observing that places have brand images (...) and claiming that places can be branded (...). Place branding (...) observes the former but does not claim the latter".

The concept and measurement of a TDI involves a complex system of interrelated sources of information, some with more influence than others in the final picture (the image), which is composed of tangible and intangible (emotional) elements. It is extremely difficult to capture all the fundamentals factors that contribute to image formation and it is not feasible to know in detail all the fragments that constitute an image from person to person because, naturally, they are all different. However, it is possible to know the big picture, and some (or the main) perceptions and dimensions that make up that image. Kavaratzis and Ashworth (2005: 507) stress that "It is the mental maps that individuals create that allow them to navigate through complex reality, because our surroundings are often more complex than the sense we make of them". These authors defend branding being the key instrument in this composition of mental images. For these authors, branding "centres on people's perceptions and images and puts them at the heart of orchestrated activities, designed to shape the place and its future".

It is, therefore, plausible that branding, specifically in the case of tourism, is a type of evidence, it transforms the beliefs and our mental assumptions about actions in viewed and "heard" images. It is likely to put (summarized) thoughts into a book or a film. To be believable, it is important, in the first instance, to understand what the users of a place see or think about it. In terms of management, it is a way to capture the main positive associations and manage them in a direct and positive way. Hall (1999: 230) argues that the concept of branding embraces "(a) a clear and distinct image of a place, which truly differentiates it from other competitors, (b) associations with quality and with a specific way of retailing to the final consumer, (c) the ability to deliver long-term competitive advantages and (d) overall, something greater than a simple set of nature attributes".

Hosanyn et al. (2006: 638) point out that a brand image is important because it "can differentiate a product from its competitors, reduce search costs, minimize perceived risks and represent high quality from a consumer's point of view". They refer to the application of branding methods to places being very recent, thus reinforcing the previous statement about the emergence of destination branding literature. Morgan and Pritchard (2012: 14) in their influential work reinforce the importance of destination branding in the context of places. These authors highlight the importance of political ability in the context of place branding. They report the possible public and private special interest in promoting special characteristics of a destination. For this reason, it is clear that "much more work is needed on how these interests intersect". Hundson and Ritchie (2009: 218) emphasize that the construction of a destination brand needs to understand the destination position, "develop a brand identity and promise, communicate that promise, and then measure the brand's effectiveness". These authors stress the importance of "experience branding", regarding establishing an emotional (intangible) relation with the visitor that can reduce the risks associated with the intangibility of tourism and facilitate a tendency to generate positive impact on the destination. In this context, Hundson and Ritchie (2009: 218) highlight the concept of "experiential marketing" as an important insight for future marketing development.

Morgan et al. (2010: 70) point out that a "brand's personality has both a head and a heart: its head is its logical features, whereas its heart is its emotional benefits and associations". Hundson and Ritchie (2009: 220) stress that "brand propositions" are now more developed in "the heart". Some examples of these promises are: the Las Vegas promise of an "exciting, sexy and safely dangerous experience", Ireland's natural cultural behaviour, the focus on local people by Australian's branding of a "warm, distinctive and authentically Australian", New Zealand's "personal discovery" or India's "physical invigoration (…) and spiritual elevation".

The branding process is not recognized if it is not delivered (communicated) in an effective way. Regarding this aspect, it seems to accord with the Internet playing a significant role, and the measurement of brand effectiveness being essential (Hundson and Ritchie, 2009). As an example is a promotion by Spain in London, namely in Regent Street, “Taste Spain” highlights the importance of experiential marketing and the effectiveness of a direct approach, regarding the senses, for potential visitors. This event, as shown in Figure 2.6, which took place on 31 May 2009 in Regent Street, 2^{nd} and $3r^{d}$ June in Borough Market and 17^{th} to $19t^{h}$ July 2009 in Edinburgh, is an example of bringing the sense of a destination to prospective visitors.

FIGURE 2.6 – TASTE OF SPAIN IN REGENT STREET, LONDON

Credits: Photo No. 1: Maria João Custódio

Photo Nos. 2, 3 and 4: http//:www.tastespain.info, downloaded on 3^{rd} March, 2010.

Blain et al. (2005: 337) refer to destination branding as “consisting of a set of marketing activities that support the creation of brand markers (e.g. name, symbol), [that] deliver expectations of memorable experiences unique to the destination, serve to reinforce an emotional connection between the place and its visitors, and reduce the risk inherent in destination selection”. These authors argue that branding is a new research concept that emerges from the widely studied concept of image formation.

Blain et al. (2005) develop a review of the literature in an attempt to conceptualize the notion of destination branding, which is presented as a comprehensive definition based on a revised definition of Aaker (1991), Ritchie and Ritchie (1998) and the input of DMOs practitioners. In this sequence, Blain *e*t al. (2005: 337) define:

> “Destination branding is the set of marketing activities that (1) support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) serve to consolidate and reinforce the emotional connection between the visitor and the destination; and that (4) reduce consumer search costs and perceived risk. Collectively, these activities serve to create a destination image that positively influences consumer choice”.

Kerr (2006: 278) make a contribution to the definition of place branding, describing it as “the practice of applying brand strategy and other marketing techniques and disciplines to the economic, social, political and cultural development of cities, regions and countries”.

According to Pike (2009), and as presented in Table 2.10, it is possible to understand the fundamental functions of a brand. A brand is a mean of differentiation in a competitive context, it enables an increase in value and confidence in a purchase context, transmitting an overall picture, or message, to different segment users of the destination. Some brands transmit a sense of belonging. Generally, Moilanen and Rainisto (2009: 6) define that, “A brand is an impression perceived in a client´s mind of a product or service. It is the sum of all tangible and intangible elements, which makes the selection unique (…). A brand is a promise of something”. These authors state three concepts of a brand: the identity, related to the message sender; the image the sender wants to transmit about the brand, i.e. the image or how the brand is perceived by the consumers of the brand; and finally the communication, which is the factor of the identity that is highlighted to the potential consumers of the brand.

TABLE 2.10 – FUNCTIONS OF A BRAND

Author(s)	Function(s)
Kapferer (1997); Keller (2003); Kotler (1988); Pappu, Quester and Cooksey, (2005); Tasci et al. (2007)	Means of differentiation
Cobb-Walgren, Beal and Donthu, (1995)	Strengthen purchase intention.
Keller (2003)	Reduce costs.
Aaker (1991, 1996)	Increase sales, price premium and customer loyalty.
Pike (2009)	Advantages for destination marketing organizations: increase the differentiation between places; increase destination loyalty and benefits to stakeholders.
Pike (2009)	Benefits for the traveller (help in decision-making, reduce search costs and risk, enhance value.

Source: Adapted from Pike (2009).

Related to the field of communication, Moilanen and Rainisto (2009: 14) divide brand sources into four categories:

- Planned messages (e.g. advertising, brochures);
- Product messages (e.g. physical settings, features);
- Service messages (e.g. contacts in the service process);
- Unplanned messages (e.g. word of mouth (WOM), newspaper articles).

These authors refer to brands that appeared 100 years ago and which have been applied to new areas, such as services and places, in the 1990s. Moilanen and Rainisto (2009: 4), quoting Gold and Ward (1994), define place selling as “using publicity and marketing to transfer selected images of certain geographical locations to the target audience”.

In an empirical study developed from, and applied to DMOs, Blain et al. (2005) state that there is a “close linkage between image and branding” in the opinion of DMOs. In this study, the authors find that “a successful brand must accurately reflect the image and experiences of the destination” (Blain et al., 2005: 335). Through this research, it was possible to establish the main issues related to destination branding: “Image; recognition; differentiation; consistency; brand messages; emotional response and creating of expectations” (ibid.: 336). One of the key findings is that there seems to have been a lack of monitoring of visitors’ destination image.

More recently, Boo et al. (2009: 221, 222) tested five dimensions to measure whether destination brand equity has: “Destination brand awareness; destination brand image; destination brand quality; destination brand value and destination brand loyalty”. Kavaratzis and Ashworth (2005: 508) highlight three aspects of brand: The brand identity, i.e. “How the owners want the brand to be perceived”; the brand positioning, “that part of the value proposition communicated to the target group that demonstrates competitive advantage”; and brand image, “how the brand is perceived”. These authors state that brand identity, brand differentiation and brand personality, as defined by Aaker (1996), are symbiotic concepts and related to the product field. The producer enhances the corporate branding and, finally, the consumer relates to brand equity that is composed of brand value, brand awareness and brand loyalty. All of these components are linked to the overall brand image perceived. By equity is meant the sum of factors (or ‘‘dimensions’’) contributing to a brand’s value in the consumer’s mind.

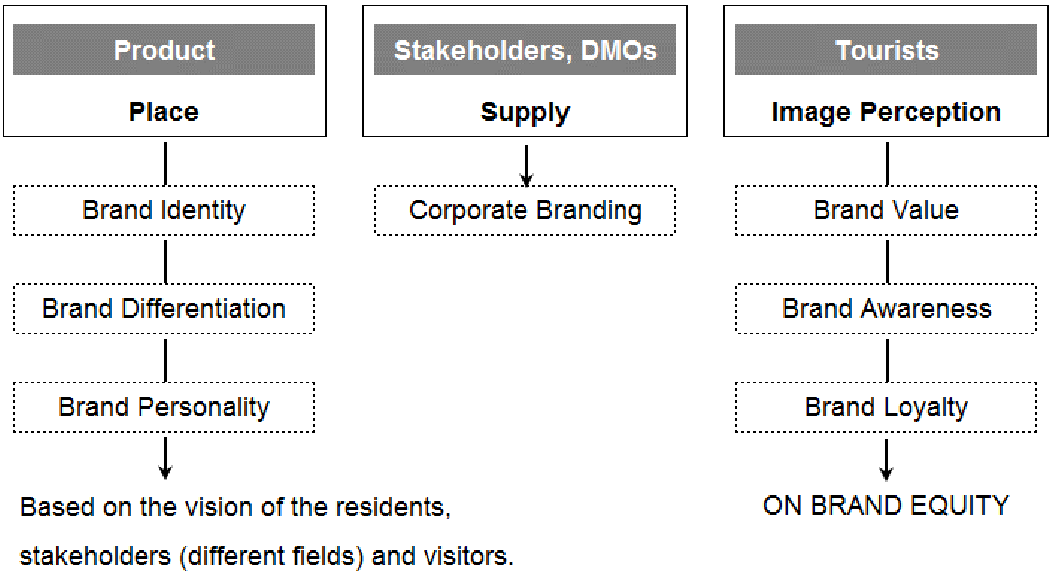
According to Konecnik and Gartner (2007: 401), brand equity is “the sum of factors (or “dimensions”) contributing to a brand’s value in the consumer’s mind". Aaker (1991: 15) defines brand equity as "a set of brand assets and liabilities linked to a brand, its name, and symbol that add to or subtract from the value provided by a product or service to a firm and/or to that firm's customers".

Pappu et al. (2005: 144) state that other definitions consider the consumer's perspective, defining brand equity "as the value of a brand to the consumer" (e.g. Aaker, 1991; Kamakura and Russell, 1993; Keller, 1993; Kim and Lehmann, 1990; Rangaswa et al., 1993). Tiwari (2010) establishes the difference between brand equity and brand value in the context of branding literature for products. For this author, brand value is the net cash-flow from a branded product when compared to a similar unbranded one, e.g. the brand management and shareholders' value. On the other hand, brand equity is connected to brand value, but from the perspective of the consumer (perceptions, behaviour and knowledge). Tiwari (2010: 421) defines brand equity as "a set of elements such as brand associations, market fundamentals and marketing assets that help distinguish one brand from another".

According to Tiwari (2010) destination awareness is connected to models of the tourism decision process, i.e. consumers' behaviour. Destination awareness is connected to destination image, it is a "prerequisite". To have awareness it is necessary an image. This concept has been mostly studied in the context of familiarity with the destination. Konecnik and Gartner (2007) refer to destination quality having been measured in the context of image and being mostly a multiple-attribute concept covering different variables. These authors refer to the difficulty of measuring the concept. Finally, destination loyalty appears to be connected in some studies with repeat visits and return intention (Konecnik and Gartner, 2007).

In making a comparison between destination and product, a model could be presented as proposed in Figure 2.7:

FIGURE 2.7 – PLACE BRANDING COMPONENTS AND ACTORS



Source: Adapted from Kavaratzis and Ashworth (2005)

From Figure 2.7 it is possible to establish relationships between the different components of a brand and the functions of place users. Considering the components of a brand, as suggested by Kavaratzis and Ashworth (2005), and place as product it is possible to identify the relations between different place consumers. With this intention, Kavaratzis and Ashworth (2005: 510) state that, “A place needs to be differentiated (…). Thus identity, differentiation and personality and thereby position in competitive arenas are all transferable concepts as long as the implications of this transfer are fully understood”.

As regards the vision established by residents, Kavaratzis and Ashworth (2005: 507) note that the “consumer’s orientation would have to be how the residents encounter the city they live in (…)”. According to Crang (1998) and Holloway and Hubbard (2001), this could be done in three ways: processes of planning, the way they use/frequent places and finally “place expressions”, as seen in the culture and entertainment industry, which relate to perceptions of the place itself. To be believable, branding must consider the visions of different users of the space (residents, workers, investors and visitors). In this context, Therkelsen and Halkier (2008) refer to how place brands could be adapted for specific place consumers, like tourists, business people, investors and residents. This thesis focuses on the segment of tourism branding.

Stakeholders or partnerships between DMOs and the tourism industry are associated with a corporate brand as the “state of will of the organization and the active part of the image building process” (Kapferer, 1992), quoted in Kavaratzis and Ashworth (2005: 509). In practical terms, and as suggested by these authors, the mission of a corporate brand can be related to “universal values”, associated with all the players of the place, which means such principles as the quality of life, social and environmental sustainability, wellbeing and innovation; in sum, a local compromise for sustainable development. This theoretical systematization is clear, although in practical terms the tourism industry is fragmented and has multiple actors, so it is difficult to define a clear “producer” (in Mailanen and Rainisto, 2009: 20), a difficulty associated with management’s marketing of places. Finally, the consumers of a place (visitors in the case of destinations) have an overall image perception of the destination, which is associated with brand value, awareness and loyalty. In general, these authors defend place branding being possible if we assume the complexity of the system, and if we are able to create sub-brands according to different users of the place (tourists, residents, workers and investors, amongst others).

Pike (2009) refers to the lack of research on destination branding, i.e. considering the important investments made by destination marketing organizations, with a clear need to monitor the effectiveness of investments in terms of image, tourism gains and differentiating. The lack of research on destination branding is concentrated in brand identity examining policy studies in destination brand decision-making, umbrella strategies, the vision of the local community, brand positioning related to different markets and brand equity related to the needs of the tourism industry. The author underlines the lack of research on other brand issues, namely loyalty and repeat visits, the effects of logos and slogans, brand funding and monitoring brand effectiveness. Regarding the process of destination branding, Pike (2009: 864) recommends long-term investment in a process of rebranding, “The objective of any brand positioning should be to reinforce the one or few determinant attributes for which the destination is already perceived positively and competitively”.

2.9 CONCLUSION

The literature review provides an essential part in understanding the main tourism destination concepts and the role of DMOs, in which destination competitiveness is developed. This in turn helps to contextualize and understand the challenges, main factors and models that need to be considered. From the literature search, it can be seen that destination branding is a fundamental area of research, i.e., it needs to be considered as it provides important insights to destination management and the effectiveness of different policies. Although it seems that the conceptual side is still in the early stages, with some important contributions from researchers in the field of image along with concepts imported from the marketing of general products, its potential for sounder tourism destination management seems to offer an exciting perspective. The model developed in this study aims to give an input that helps to fill the gap identified in the literature review.

During the process of reviewing the literature, the concepts were identified and the gaps recognised, allowing the construction of a theoretical and empirical model that attempts to put together the main issues for a successful destination management strategy. Within this process one of the main early difficulties was the fact that it seems to exhibit some paradoxes related to the delimitation of a tourism destination. Most of the authors quoted (Shaw and Williams (2004); Urry (2000); Moilanen and Rainisto (2009)) recognise that tourism destinations seem to be perceived as unique entities. This literature review did not find any study that empirically tests the tourist views of the destination delimitation. Therefore, one of the gaps the thesis tried to fulfil is identify the tourists' views of spaces (the Algarve place preferences). As defended by Moilanen and Rainisto (2009), to manage the destination as a single brand there needs to be an understanding of how the destination is identified by the visitors. The model also introduces as an input the views of the stakeholders. As previously expressed, it is not possible to establish a strategy without a clear understanding of the main strengths and weakness that the destination faces in a context of an increased competitiveness. Another gap identified in the literature emerged from Blain et al. (2005), which argues that considering the importance of the destination image in the context of destination choice, it is critical to have an integrated perspective with regard to destination branding, image and competitiveness. This is one of the reasons and motivations of this research. It seeks to put together the main issues regarding these three areas of study.

Concerning the measured variables of the model, which will be expanded upon in the analytical model presented in more detail in Chapter 3, the literature review reveals a need for a better understanding of a tourism destinations' image measurement and evaluation. The revision made was extremely important for the design of the research framework and an understanding of the main issues to be considered. The analysis helped to contextualize the tourism destination branding dimension and possible stakeholders' management interventions.

As a systematization of the links, the conceptual model, presented in Figure 2.8, considers the different inputs generated in the literature, namely:

- Regarding the times of visit, it introduces the views of Chon (1990) and Pearce (1982), who considered the need to understand visitor experience (the pre/post-visit) in order to understand the level of satisfaction, which is a comparison between the expectations and the experience with the destination;

- Chi and Qu (2008: 634) reflected the gap in the seasonality measurement. For these authors, tourists tend to have different opinions depending of the travel period. For this reason, and as seasonality could restrict the generalizability of the findings, and even more in a region such as the Algarve with its high seasonality, it was considered important to incorporate the measurement of the specific characteristics of the visitors in the peak/off-peak season;

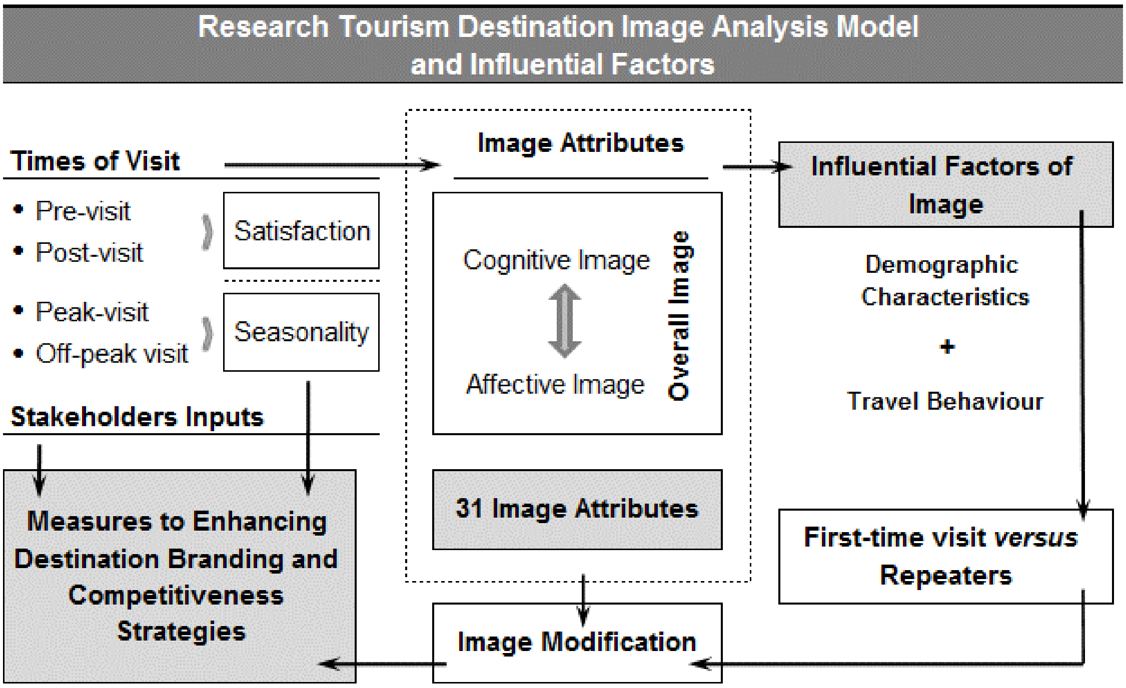
- The model incorporates the destination image "classical" general framework structure, originally defined by authors as: Echtner and Ritchie (1991); Bologlu and McCleary (1999) where destination image is composed by a cognitive and effective dimension. The stimulus factors are the ones defined by Bologlu and McCleary (1999) as the “external forces” not connected with the social or psychological context of the visitor. The travel behaviour considered in this study are the variables linked with the visitor’s context of travel. These two backgrounds formed the named influential factors of destination image. The influential factors considered in the model are later tested in the form of variables in the empirical phase of the research. These were selected based on the review of literature and specifically the studies consulted and described in Table 2.2;

- Considering the importance of the repeat visitors in the Algarve, the segment of first-time and repeaters were incorporated within the model in order to understand the links between the two segments and the different components associated with destination image. The first-time and the repeaters were specifically studied by authors such as: Beerli and Martin (2004); Valle et. al (2006); Chi and Qu (2008) and Chi (2012) in the context of destination loyalty;

- Overall image modification was introduced, following the recommendations of Qu et al. (2011: 473) who consider important to measure the overall image, which could influence future behaviour intentions. This overall image evaluation is called image modification in the adopted model and considers the visitors’ global opinion about the Algarve image as a destination.

The model incorporates research on image variables (listed in Table 2.3), models of decision making ((Chon (1990); Baloglu and McCleary (1999); Echtner and Ritchie (1991); Gartner (1993)) measured through a mixed-methodology, which is considered a different approach to destination image conceptualisation and empirical analysis. It also tries to fill the gap presented by Therkelsen and Halkier (2008: 161) who argue that it is important to “combine different offers, stakeholders and populations in the branding strategy”.

FIGURE 2.8 - CONCEPTUAL FRAMEWORK OF THE TOURISM DESTINATION IMAGE MODEL



Source: Author.

Based on previous studies, the model shown in Figure 2.8 considers the different components of destination image (cognitive and affective image) and the factors that could influence its formation. These factors include the demographic characteristics and the tourist travel behaviour, the last one including some stimulus factors as defined in the literature.

Beerli and Martín (2004) assumed that the cognitive component of destination image comes before the affective component. These authors also emphasize the lack of reliability of the scales used to measure destination image, an aspect that is explored in this research.

Finally, as it links theoretical developments with an empirical study, this research makes a contribution to the conceptualization of destination image as an instrument to destination branding and competitiveness practices. Beerli and Martín (2004) emphasise the lack of framework and solid conceptualization within the field of destination image. This opinion is shared by Fakeye and Crompton (1991) and Baloglu and McCleary (1999), while MacKay and Fesenmaier (1997) also emphasise the need for empirical studies that investigate the forces that influence destination image. This is another particular gap in the literature in which the thesis makes a distinctive contribution.

CHAPTER 3 – METHODOLOGY AND RESEARCH DESIGN

3.1 INTRODUCTION

The aim of the present chapter is to discuss and present the methodology adopted, the research framework and the methods used to attain the research objectives. The methodological approach is specifically selected from the fields of image-making, destination branding and competitiveness.

Creswell (2006: 4) highlights the need to differentiate between methodology, design and research methods. The methodology is linked to “the philosophical framework and the fundamental assumptions of research” (Van Manen, 1990), and interrelated to the entire process of research. In the social sciences, the methodology is constructed by referring to a model of analysis based on a selected scientific method, which is composed of concepts, definitions, hypotheses, variables and indicators.

The research design is linked to a plan of action that associates the philosophical hypothesis to methods (Creswell, 2003; Crotty, 1998), in which experimental research, survey research, ethnography and mixed methods are all research designs.

Research methods are more detailed. Creswell (2006:4) regards methods as “techniques of data collection and analysis, such as a quantitative standardized instrument or a qualitative theme analysis of text data”. Pardal and Correia (1995: 10) define methods as a “set of operations, situated at different levels, having in mind the prosecution of defined goals. Corresponds to a guiding body of your research, that obeying to a system of norms, enables the selection and the articulation of techniques, in order to develop a process of empirical verification”.

Being part of a scientific definition, objectivity in the social sciences depends largely on coherent methodological options, although it is known that the instruments and methods used sometimes incur some degree of ambiguity. The methodology is connected not only with the science that studies scientific methods but also to research techniques, and finally to epistemology and the nature and scope of knowledge.

There are three research types: exploratory, descriptive and causal. Normally, exploratory research is used when the aim is to discover new ideas, define concepts and knowledge about a theme and, in general, seek a deeper understanding of the subject of analysis. As stated by Chisnall (2005), it is often conducted in the first stage of research. Descriptive research, as the name suggests, is linked to describing a known subject in relation to established variables. Finally, causal research involves establishing relations between variables (cause and effect) or, in statistical language, independent and dependent variables of a phenomenon, and the nature of a relationship. The three research types are not mutually exclusive; rather, they are frequently used in a research sequence.

The methodological options in this research study consider the concepts defined above and the specificities of marketing research. According to Gunn (1994), marketing is an instrument that supports decision-making and the methods most often considered in this area rely on the use of secondary and primary data (questionnaires and interviews).

After the theoretical research (literature review), the empirical phase goes through the semi-structured interviews design and the questionnaire construction to be applied to regional stakeholders and tourists who visit the Algarve, coming from or returning to Exeter.

Regarding the various research approaches, the main considerations concerning the use of mixed methods (qualitative and quantitative) are discussed in Section 3.2. This section aims to explain the inclusion of these methods in the present research. More particularly and justifying the research methods adopted, the focus of discussion is on the methodological approaches regarding TDI measurement. The section then proceeds to examine the use of qualitative and quantitative research methods, specifically in the marketing field. Section 3.3, termed “research design”, introduces research development, namely the empirical research design approach. This section is important to clarify and enumerate the methods applied in the context of the Algarve tourism destination, and includes design details of the instruments used to fulfil the research aims and objectives, namely a questionnaire and semi-structured interviews. The following section, 3.4, presents the fieldwork administration and sampling methods, in which is emphasized the global schedule of the fieldwork implementation and the steps taken to overcame the main constraints and fulfil the data-collection objectives. Finally, Section 3.5 explains the data analysis methods used to measure the variables.

3.2 Methodological Research

3.2.1 Qualitative and Quantitative Research Methods

The literature on the different research fields tends to present two types of research methods: quantitative and qualitative. According to Wright and Crimp (2000), there are advantages to using both quantitative and qualitative methodologies and these should not be perceived as mutually exclusive but as tools that, when used together, can add value to research. In the case of qualitative research, the author highlights the main advantage being the possibility of capturing the thoughts of respondents in more detail while its informality and exploratory nature may be a disadvantage. In the present research, qualitative techniques are used at different points.

Specifically, in quantitative research, it is considered that it “aims to measure using numbers or a numerical measurement of specific aspects of phenomena” (Miller and Brewer, 2003: 192). In the area of tourism, quantitative research is important due to the need to collect data on an increasingly growing number of variables and destinations that are an adjunct to the global expansion of the industry. Cumulatively, stakeholders and destination managers pay more attention to quantitative research (Dwyer et al., 2012).

Opting to use one or other method depends on the research objectives and normally, in the social sciences, quantitative research tends to be more “popular”. VanderStroep (2010), Ledgerwood and White (2006) and Richards and Munsters

(2010) promote a framework stating the main differences between the two, are shown in Table 3.1:

TABLE 3.1 – MAIN DIFFERENCES BETWEEN QUANTITATIVE AND QUALITATIVE RESEARCH

Characteristic	Research Type	
	Quantitative	Qualitative
Purpose	Test hypotheses or specific research questions. To measure the degree and extent of attitudes.	Discover ideas, used in exploratory research with general objects. To gain in-depth understanding of consumers' attitudes and behaviour.
Analysis/Approach	Descriptive and inferential statistics.	Identification of major schemes.
Research design	Descriptive and causal research designs.	Exploratory research designs.
Types of data	Phenomena are described numerically. Numbers, percentages, means, less detail or depth, nomothetic description, context poor, high reliability, low validity, statistical inferences possible.	Phenomena are described in narrative fashion. Words, pictures, concepts detailed and in-depth, idiographic description, context-rich, high validity, low reliability, statistical inferences not possible.
Researcher independence	Researcher an uninvolved observer. Results are objective.	Researcher is intimately involved. Results are subjective.
Scope of enquiry	Specific questions or hypotheses.	Broad, thematic concerns.
Primary advantage	Large sample, statistical validity, accurately reflects the population.	Rich, in-depth, narrative description of sample.
Primary disadvantage	Superficial understanding of participants' thoughts and feelings.	Small sample, not generalizable to the population at large.
Confidence level	Conclusive, with a specific degree of certainty.	Explorative, anecdotal.
Techniques	Structured response, categories provided.	Unstructured or semi-structured, free forms.

Tools	Simple and complex surveys, database analysis (cross-tabulation).	Focus groups, in-depth interviews, mystery shoppers.
Participants	Samples offering a statistical representation of the population.	Small and homogenous groups.
Results	Codified results, compiled as statistics.	Words and descriptions.
Training and preparation	Consistency and precision of questions used. Computer analysis.	Understanding objectives of the study.
Strengths	Conclusive, its results can be inferred to the rest of the population. Better for costly investment because it measures degree and frequency of behaviours.	In-depth exploration of questions. Better understanding of underlying behaviours. It can be implemented by staff.
Weaknesses	Bias in the form and the questionnaire can be costly and time-consuming. Usually implemented by outside marketing firms.	Subjective, bias can be introduced in the execution and analysis of results. Not conclusive, research cannot be inferred for the whole population.
Other factors	Measure objective facts; Focus on variables; Reliability is the key; Value-free; Independent of context; Many cases or subjects; Statistical analysis; Researcher is detached from subject.	Construct social reality, cultural meaning; Focus on interactive processes, events; Authenticity is the key; Values are present and explicit; Situationally constrained; Thematic analysis; Researcher is involved in the subject.

Sources: VanderStroep (2010); Ledgerwood and White (2006); Richards and Munsters (2010); Zikmund and Babin (2007); McGivern (2003).

In general, qualitative research is more frequently used in exploratory research to discover new issues and quantitative research when the focus is on testing hypotheses on known subjects. Either can be used in different phases of research or separately, depending on the objectives.

Witkowski and Jones (2006: 73) suggest that whether data are qualitative or quantitative they represent a “social perception” of facts, so the researcher must view them with caution and avoid “overgeneralization”. These authors claim that data interviews are “especially useful for consumer history because they usually entail ordinary people recalling everyday experiences” (Witkowski and Jones 2006: 75).

3.2.2 Use of Mixed Methods in Marketing and Tourism

Mixed methods are known as the “third methodological movement” (Tashakkori and Teddlie, 2003: 5), the “third research paradigm” (Johnson and Onwuegbuzie, 2004: 15) or a “new star in the social science sky” (Mayring, 2007: 1). Johnson and Onwuegbuzie (2012: 17) define mixed-methods as “the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts or language into a single study”. Greene, Caracelli and Graham (1989: 256) define mixed-method designs “as those that include at least one quantitative method (designed to collect numbers) and one qualitative method (designed to collect words)”. Creswell and Clark (2010: 3) define mixed methods as the combination of “qualitative and quantitative approaches in the methodology of a study”. As defended by these authors, research using mixed methods is important when “the investigators may not know the questions that need to be asked, the variables that need to be measured, and the theories that may guide the study”.

Johnson et al*.* (2007: 123) conclude with a merged definition: “Mixed methods research is the type of research in which a researcher or team of researchers combines elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis, inference techniques) for the purposes of breadth and depth of understanding and corroboration”.

The use of mixed methods is described as helpful in certain circumstances:

- To explore a phenomenon;

- To develop and test a new instrument;
- To serve a theoretical perspective;
- To complement the strengths of a single design;
- To overcome the weaknesses of a single design;
- To address a question at different levels;
- To address a theoretical perspective at different levels[2].

In the present research, the importance of using mixed methods is mainly useful to "explore the phenomenon", "to develop a new instrument" and "overcome the weaknesses of a single design". Creswell and Clark (2010: 5) highlight the key work involved in designing and conducting a mixed-methods study:

- Collects and analyses persuasively and rigorously both qualitative and quantitative data (based on research questions);
- Mixes (or links) the two forms of data concurrently by combining them (or merging them), sequentially by having one build on the other, or embedding one within the other;
- Gives priority to one or to both forms of data (in terms of what the research emphasizes);
- Uses these procedures in a single study or in multiple phases of a program of study;
- Frames these procedures within philosophical worldviews and theoretical lenses; and combines the procedures into specific research designs that outline plans for conducting the study.

[2] Source: http://researchrundowns.files.wordpress.com/2009/07/rrmixedmethods_71909.pdf.

Table 3.2 summarises the advantages of conducting mixed-methods research.

TABLE 3.2 – ADVANTAGES OF USING MIXED METHODS

Author	Advantage(s) Enumerated
Creswell (2006: 9)	"Mixed methods research provides strengths that offset the weaknesses of both quantitative and qualitative research".
Creswell (2006: 12)	"Mixed methods research provides more evidence for studying a research problem than either quantitative or qualitative research alone".
Creswell (2006: 13)	"Mixed methods research encourages the use of multiple worldviews, or paradigms (i.e. beliefs and values), rather than the typical association of certain paradigms with quantitative research and others for qualitative research".
http://resourcecentre.foodrisc.org/mixed-methods-research_185.html	"Provides strengths that offset the weaknesses of both quantitative and qualitative research".

Source: Creswell (2006).

In the area of tourism and specifically for knowledge of TDI and marketing, research based on mixed methods seems to be appropriate considering tourism's multidimensionality. The interest in image lies in its important contribution to better knowledge of consumer/tourist behaviour, awareness of factors of attraction, destination choice decisions and places' uniqueness. This is an integrated knowledge that represents a contribution to place branding strategy and destination competitiveness.

The complexity of tourism image formation, along with the existence of a variety of influencing factors, reinforces the permanent need for new developments, conceptual and empirical, which are essential to innovative destination marketing strategies and up-to-date competitiveness approaches. This knowledge benefits from constant improvements and discussions in a variety of different research areas. In fact, the multidimensionality of the image concept has allowed several studies since the 1970s in a diversity of fields, namely anthropology, geography, psychology, semiotics and tourism marketing (e.g. Gunn, 1972; Gartner, 1989, 1993; Moutinho, 1987; Woodside and Lysonski, 1989; Chon, 1990; Echtner and

Ritchie, 1991; Crompton, 1992; Baloglu, 1997; Baloglu and McCleary, 1999), amongst others. Gallarza et al. (2001) refer to how the specificities of TDI measurement make its measurement a methodological challenge. These authors highlight that TDI studies are versatile.

There seems to be a strong incidence of the use of survey methods in image research. In this context, the literature review regarding TDI allows the synthesis of two methodological approaches: structured and non-structured. In the structured methodological approach, different image attributes are listed and incorporated in a standardized instrument, normally using a group of semantic differential or Likert scales to measure it. Normally, Likert scales are used to capture the cognitive dimension (e.g. very good to very bad) and semantic differential scales are used to measure the affective dimension (e.g. exciting to boring). A destination is classified by the interviewees in each of the attributes and the rating from this evaluation results in a tourism destination profile. The advantages of using a structured scale are multiple: easy to administer, simple to codify, the results can be analysed using powerful statistical techniques and, finally, facilitates comparisons between different destinations and between every attribute included in the scale of items. The disadvantages are related to the inflexibility of destination image evaluation, since it forces the interviewees to classify a destination according to a standardized model and does not allow measuring the unique characteristics of a destination.

The consistency of TDI structures methodologies can be highly variable depending on the techniques used to select the image attributes included in the scales. These attributes should contain both functional and psychological characteristics.

On the other hand, non-structured methodological approaches are an alternative way to measure destination image. This type of methodology uses free description to measure image (Echtner and Ritchie, 1991). In the present research, the research methodology approach uses open-ended questions to capture decisive factors for visiting the Algarve, competitive destinations, websites used to obtain information, stereotypical images and place location preferences within the Algarve (in terms of accommodation). With this information, content analysis and categorization methods are then used by the researcher to determine image dimensions. This methodology enables identifying the holistic and unique aspects of a destination.

The disadvantage of this kind of methodology concerns the level of detail achieved, which normally depends greatly on the verbal or written skills of the interviewees. Considering the qualitative nature of the data, the statistical analysis is limited and a comparison between destinations is normally not possible to do in an objective way. The majority of researchers have tended to measure destination image by following a structured methodology, given the advantages of quantification and comparability. In this kind of research, Likert scales and semantic differential scales are used to measure TDI.

However, to overcome the disadvantages of each methodological approach, the use of both methodologies is recommended in the literature. This is the position adopted by the current research, in which mixed methods are employed to explore and enhance the role of image in destination branding and competitiveness in the main foreign market (the UK) for the Algarve. The links between research objectives and approaches are shown in Table 3.3:

TABLE 3.3 – RESEARCH OBJECTIVES AND APPROACHES

Research Objective(s)	Approach(es)
1. To investigate the framework of destination image concepts and related methodological developments in destination branding and competitiveness models.	Qualitative analysis: literature review and meta-analysis to compare the different studies undertaken in destination image-making. Semi-structured interviews. Exploratory research.
2. To create a model of analysis for TDI measured in different periods of time and composed by the main variables which could improve destination branding and competitiveness strategies.	Qualitative analysis: literature review and meta-analysis to compare the different studies undertaken in destination image making. Semi-structured interviews. Exploratory research.
3. To compare the profiles and images of four different target markets of visitors: pre/post-visit and peak/off-peak seasons in the Algarve as a tourist destination.	Quantitative analyses to measure the different variables. Descriptive research.

4. To investigate the secondary image (pre-visit) as opposed to the primary image (post-visit) of the Algarve as a destination, by applying models of TDI and testing the differences between pre/post-visit and peak/off-peak seasons.	Mixed-methods approach. Qualitative analysis to select the attributes to be measured via a questionnaire. Quantitative analysis to measure pre/post-visit image. Descriptive and causal research.
5. To develop an integrated image of the Algarve as a tourism destination.	Quantitative analyses to measure Algarve's overall image. Causal research.
6. To analyse whether first/repeat visitors and variable image modification have an impact on travel behaviour and visitor profiles.	Quantitative analyses to measure first/ repeat visitors' image. Causal research.
7. To propose measures to enhance destination branding and management practices based on the findings of this study.	Qualitative research.

Source: Author.

The relationships established in Table 3.3 are in agreement with Echtner and Ritchie's (1991) guidelines. These authors propose undertaking an extensive review of literature and research in the first phase of survey construction. For example, qualitative research (focus group or interviews) is very useful to collect one complete list of the attributes that are relevant to and important for consumers and, as a sequence, quantitative research is practical to build up numerical ratings and destination comparisons. The consistency of both of these data-acquisition methods for quantitative and qualitative research is essential to the reliability of a future destination branding strategy.

3.3 Research Design

3.3.1 Research Phases and Content

According to McDaniel and Gates (2001) research design plays an important role guiding all the research in terms of method, data collection/sampling and instruments of analysis. It is decisive for pursuing the research objectives.

Firstly, the main issues regarding TDI and branding are identified in the designated “grey literature”. This analysis of the literature is extremely important to understanding the main activities developed in the context of marketing and the main constraints that the region faces. This is the first step presented in Table 3.4:

TABLE 3.4 - RESEARCH PHASES

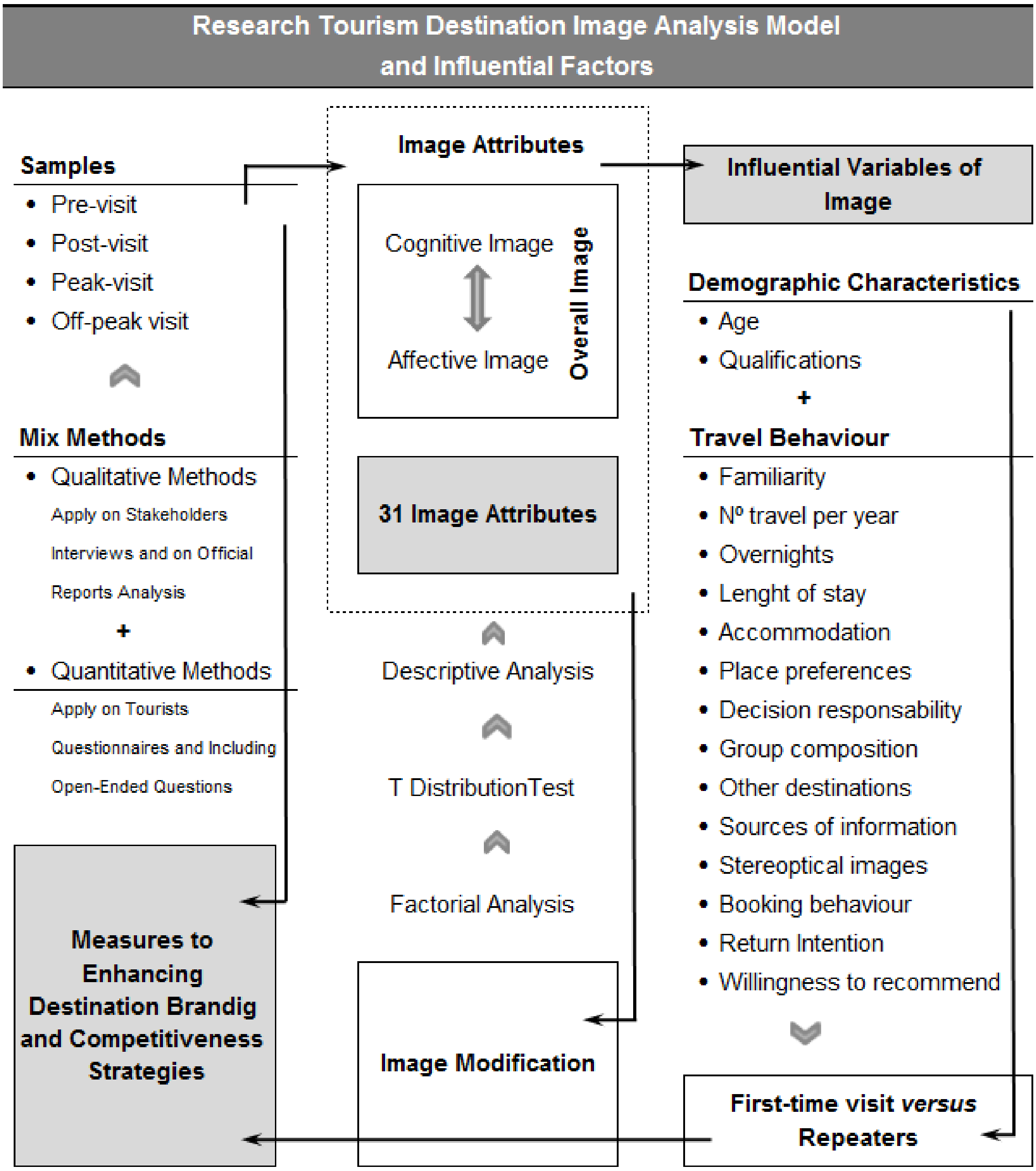
Order	Phases
1	Review of the literature, concepts and methodologies;
2	Mixed methodology definition and preliminary data research (qualitative);
3	Empirical data collection (quantitative), fieldwork;
4	Results, findings and discussion.

Source: Author.

In sequence, the research goes through a mixed methodology definition, followed by primary data collection. Two types of primary data are collected. Semi-structured interviews (qualitative data) and a questionnaire are used for UK visitors to the Algarve (mixture of qualitative and quantitative questions, also called non-structured and structured questions). Finally, after achieving the main results, the final phase focuses on the findings and a discussion.

These are the stages through which implementation of the research model of analysis is applied, as represented in Figure 3.1, in an effort to produce an integrated conceptual model of destination image to be used as an instrument for destination branding and competitiveness, with application to UK tourists in the Algarve as a destination.

FIGURE 3.1 – RESEARCH MODEL OF ANALYSIS



Source: Author.

The research model includes a mixture of quantitative and qualitative methods, selected according to the needs of different data sources and following research about the methods available in the literature. After considering the state of the art, the administration of semi-structured interviews and the analysis of official reports, a set of variables was selected which includes a list of 31 image attributes for overall affective and cognitive image perception. The model was applied and 716 questionnaires were collected accordingly and separated into four questionnaire subsamples: pre-visit (221), post-visit (495), peak (358) and off-peak (358). The distinction between peak/off-peak was made considering the available flights from Exeter to Faro with the Flybe airline company which routinely cancels its operation between November to May. The off-peak was considered as starting on 15th September, at the end of the summer school holidays.

Within these samples, a descriptive analysis was conducted to identify lists of similarities and differences between the samples and, afterwards, a test of differences between means was applied based on the studies and recommendations of O'Leary and Deegan (2005), Wade and Eagles (2003) and Pike and Ryan (2004) regarding pre/post-visits. Regarding peak/off-peak Chi and Qu (2008: 634) state that, "tourists who travel in different seasons may form different opinions of a destination. Seasonality restricts the generalizability of tourism research findings, and should always be taken into consideration in the interpretation stage". The research model also includes the evaluation/valorisation of global TDI and measurement of the main dimensions of its structure, as identified through factorial analysis.

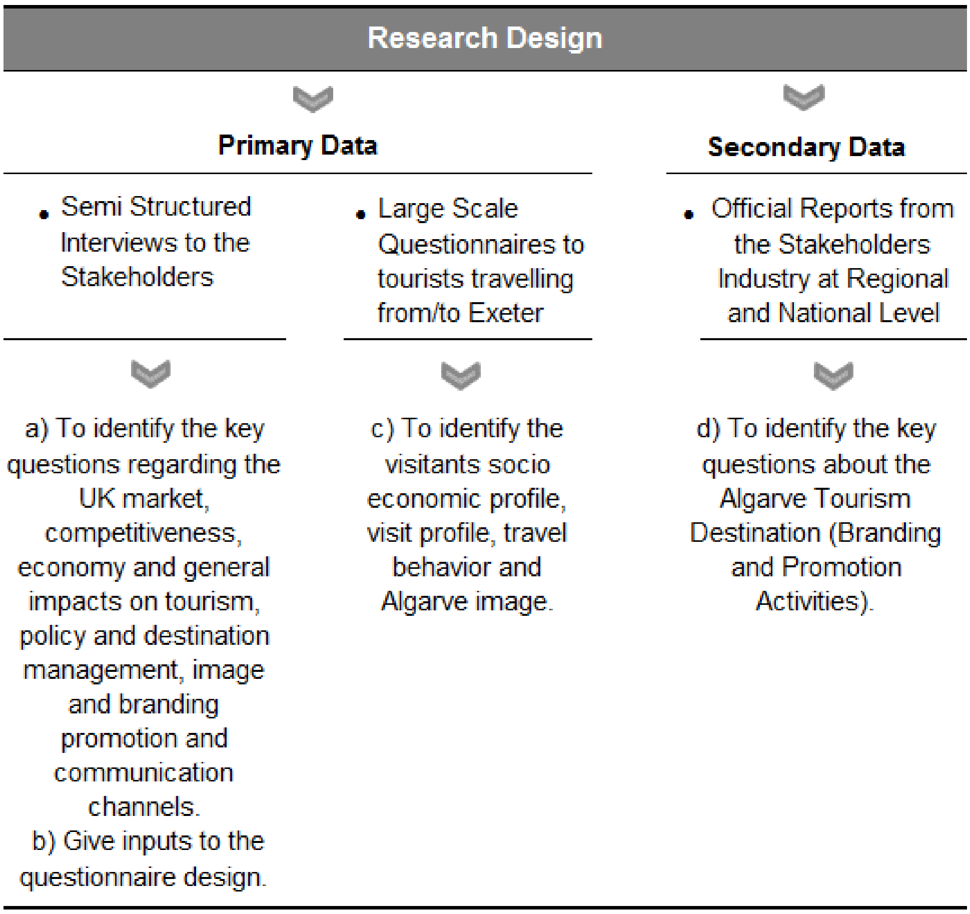
Overall image modification was then considered, interposing the recommendations of Qu et al. (2011: 473) who state that "it is the overall image (...) which influences tourists' future behaviours". This overall image evaluation is called image modification in the adopted model, and it considers five sub-questions which are then aggregated into three in the analysis: visitors were asked if a visit to the Algarve resulted in a change of image for better or worse, or if it stayed the same.

Finally the model covers influential variables of destination image, as suggested by the literature review, in which a list of 16 possible influential variables are considered and collected along with the four subsamples. This list is organized into two main categories: the demographic characteristics and the travel behaviour of tourists. Then, due to their importance, two key variables were selected among these influential factors in order to contribute to destination management practices: first-time and repeat visitors (variable 1) and image modification (variable 2). These two variables are considered based on the literature review findings and the nature of the Algarve as destination in terms of tourism development; it is a region that is identified as a mature destination, and as a result has a high percentage of repeat visitors as noted and studied by Beerli and Martín (2004) and Chi (2012).

Using these two key variables – image modification and first-time visit versus repeaters – and consequent findings, the model aims, finally, to consider reliable information about destination image and influential factors to support and enhance destination branding and competitiveness strategies.

Taking into consideration the research model of analysis, the types of data, methods and objectives of the research, it is possible do draw a general research design framework, as previously referred to by Creswell (2003) and Crotty (1998), which is presented in Figure 3.2:

FIGURE 3.2 – RESEARCH FRAMEWORK



Source: Author.

Due to the nature of TDI, the qualitative approach of the research (semi-structured interviews and open-ended questions in the questionnaires) plays an important role in terms of clarifying the main dimensions of TDI (mainly the affective dimension), the decisive factors in visiting the Algarve, competitive destinations, websites used to get information about the Algarve, stereotypical images and Algarve place preferences (in terms of accommodation).

To achieve this goal, and before the questionnaire design, the researcher conducted ten semi-structured interviews with UK residents, who had or had not visit the Algarve, regarding their holiday experiences and images of Portugal and the Algarve. Afterwards, five other semi-structured interviews were organised with the main stakeholders that have competencies in the Algarve's tourism destination planning, promotion and transport networks. The entities interviewed were: the Algarve's Tourism Delegation of the Portuguese Tourism Board in the UK (London), Faro International Airport, the Algarve Tourism Association, the Regional Development and Coordinating Commission of the Algarve and, finally, the Algarve Hotels Association. The interviews were conducted during the months of May, June and July, 2011. This was done to validate and understand the specific regional factors and macro-environment that influence destination image.

As stated, the present research uses qualitative and quantitative analyses. The importance of applying these two methodologies is supported by Veal (1997) in the context of tourism research. After the qualitative analysis, two questionnaires were designed: one for pre-visit, which was administered in the baggage claim area; and another one for post-visit, which was administered in the check-in area. Both questionnaires were applied in the off-peak season (from mid-September to October) and the peak season (July to mid-September).

These questionnaires allowed collecting data to fulfil different objectives, specifically:

- To compare the profiles and images of four different target markets of visitors: pre/post-visit and peak/off-peak seasons in the Algarve as a tourist destination;

- To investigate the secondary image (pre-visit) as opposed to the primary image (post-visit) of the Algarve as a destination, by applying models of TDI and testing the differences between pre/post-visit and peak/off-peak seasons;

- To develop an integrated image of the Algarve as a tourism destination;

- To analyse whether first/repeat visitors and variable image modification have an impact on travel behaviour and visitor profiles.

To achieve the proposed objectives, reliance was placed on image measurement models as discussed in Chapter 2. The two considered periods are based on the hypotheses that tourists coming to this destination might have different perceptions about the Algarve and different levels of satisfaction. The periods were established by the author, considering scheduled direct flights from/to Exeter and the possible influence of school-holiday periods.

Thanks are due to the excellent collaboration with Faro International Airport, whose Administration Board allowed questionnaire administration in restricted areas: Baggage Claim and Check-in. The questionnaires were distributed in those areas to tourists who were arriving/departing from/to Exeter airport.

It is not possible to identify any respondents who completed both pre/post surveys as it was not one of the objectives of the study. The differences between the two groups were tested a-propos the image attributes, the first-time and repeaters and the image modification. The statistics demonstrate some differences between these identified groups which will be presented in detail in Chapter 6 in the data main findings.

The fieldwork took approximately six months to complete. The next sections, 3.3.2.1 and 3.3.2.2, describe the design of the research instruments, semi structured interviews and questionnaire, respectively, followed by field research and sampling methods in Sections 3.4.1 and 3.4.2. Finally, Section 3.5 resumes the data analysis and validation according to the conceptual framework and methodologies adopted.

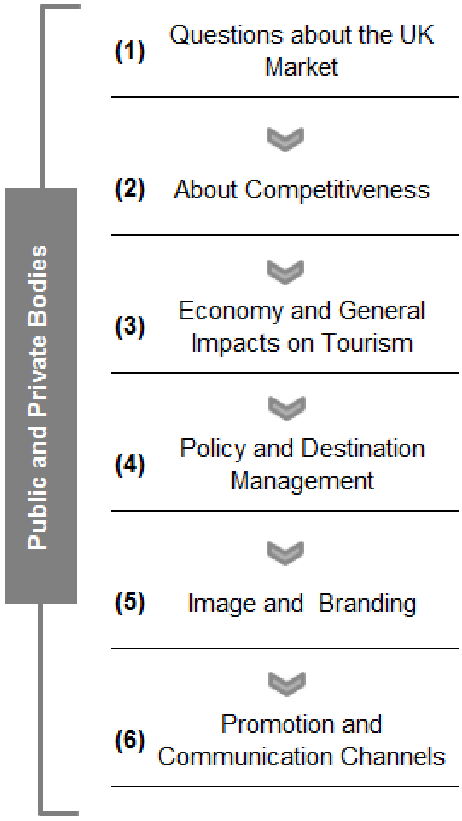
3.3.2 Design of the Research Instruments

3.3.2.1 Semi-structured Interviews' Conceptualization

The semi-structured interviews play an important role in validating and understanding specific regional factors and the macro-environment that influence destination image and future actions on tourism destination branding. In general, the questionnaire survey will receive input from the semi-structured interviews' main issues and the results will be useful when proposing a final branding strategy for the UK market in the Algarve. Via this mixed approach, it is possible to merge the views from the demand and supply sides of the Algarve as a destination.

The questions were devised by considering the analyses of reports produced by the main tourism destination organizations and from the knowledge of the researcher who has been working on research on the Algarve as a tourism destination for about ten years. This kind of method is flexible in terms of its administration, so the questions do not need to flow in a sequential way and can be "transformed" according to the course of the interview (Bryman, 2004). So, semi-structured interviews were composed with the following groups of questions (see Appendix 1 for a copy of the full stakeholders semi-structured interview script).

FIGURE 3.3 – GROUPS OF QUESTIONS IN THE SEMI-STRUCTURED INTERVIEWS WITH STAKEHOLDERS



Source: Author.

As illustrated in Figure 3.3, the first group of questions were about the United Kingdom market for Algarve as tourism destination. This group of questions comprised 19 questions (Q1–Q19) which were applied depending on the stakeholder's responsibility in Algarve tourism administration. The questions/answers are designed to understand the importance and main constraints and potentialities of this market and to identify its main issues as they affect different stakeholders. Q1 is about the importance of the UK market to the airport business, Q2 is about an understanding of what is done to manage routes to the UK, and Q3 tries to probe the impact of air transport on the Algarve's tourism development. Q4 looks deeply into the role of the low-cost airline business as it relates to Algarve tourism. Related to the airport's impact on the UK market for the Algarve, Q6 asks if Faro Airport has developed any marketing activities for the UK market. More generally, Q7 tries to understand if, and why stakeholders consider that investment in the UK market is important for the Algarve. Q8 is about the perceptions of budget evolution for promotion of the UK market in the last 10 years. Questions 9 and 10 are concerned with the Algarve's infrastructure in general and the main strengths and weaknesses of the Algarve's accessibility by land, train, air and sea.

The main idea is to debate a comprehensive list of themes, from specific aspects of the UK market till inputs about policy and general destination management, with the objective of double check the key questions/variables to be applied during the tourists questionnaire, as shown in Figure 3.4.

FIGURE 3.4 – EXAMPLES OF QUESTIONS FROM STAKEHOLDERS SEMI-STRUCTURED INTERVIEWS

Nº	Theme of Questions
1	**Questions about the UK Market**
1.2	What is the main idea of the Algarve transmitted in the UK?
1.5	What is the positioning of the Algarve in the global market? And in the UK?
2	**About Competitiveness**
2.1	In your opinion, which are the destinations that compete with the Algarve? Now and in the future?
2.3	Which aspects differentiate or could differentiate the Algarve from other tourist destinations?
3	**About Economy and General Impacts of Tourism**
3.6	And what about the air transport? Strengths and weaknesses?
3.12	Is there any projects and activities that connects tourism with the community (residents)?
4	**About Policy and Destination Management (in general)**
4.1	How do you describe the networking between the different entities related to tourism in the Algarve?
4.3	Is there any entity that analyzes the tourism experience and tourism satisfaction?
5	**About Promotion and Channels of Communication**
5.1	If I ask you about a statement that could identify the Algarve for a foreigner, what would you say?
5.8	Is there any group or institution that manages the Algarve brand? Which resources are applied to the management of the Algarve brand?
6	**About Promotion and Channels of Communication**
6.4	How are the strategies of promotion organized and structured regarding the Algarve for the UK market?
6.7	How do you manage the contacts regarding the promotion and commercialization of the Algarve? Which are the best channels? Tour operators, internet, high street travel agencies, …?

Source: Author.

Connected with promotion there are three questions in this first group: Q11 about the impact of promotion on the airport business; Q12 covers the role of the airport in promotion and Algarve image-making. The core idea of the Algarve as a destination in the UK is considered in Q13, with a request to give an importance rating (percentage) for five products in the Algarve for the UK market, namely: sun and sea, Meetings Incentives Conferences and Exhibitions (MICE), golf, wellness, wellbeing and cultural.

The Algarve's positioning in a global context and in the UK is considered in Q15. Q16 tries to measure stakeholders' perspectives about the UK's profile, namely age range, composition of groups, booking profiles, types of accommodation used, special needs, preferred times to travel, principal motivations, economic and social profiles. Finally, Q18 tries to identify if they know about or have studied the UK market for the Algarve and, finally, to recognize the main constraints on commercializing the Algarve as a destination.

The second group of questions focuses on the Algarve's competitiveness. In this group, the research tries to understand the role of different stakeholders in relation to Algarve tourism's competitiveness. The questions introduced within Q1 are about which destinations are competing with the Algarve as a tourism destination now and in the future; Q2 concerns which steps could be undertaken by private and public bodies to develop the competitiveness of the Algarve for tourism, as well as examples of those steps; Q3 focuses on which aspects differentiate or could differentiate the Algarve from other destinations, and finally, Q4 asks about which market segments could help to develop the Algarve and strengthen its competitiveness.

The third group is related to the economy and general impact of tourism. This group tries to identify background activities connected with the tourism industry in the Algarve. At first, Q1 and Q2 try to identify positive and negative aspects associated with the Algarve. Then, Q2 to Q7 develop the attractiveness factors of the Algarve in general and the main strengths and weaknesses of human resources in tourism. Next, Q8 tries to understand if there exists any relation between tourism and other economic activities, and Q10 is about the main positive and negative contributions of tourism to the Algarve's development.

The fourth group of questions is connected with the policies and management of the destination in general. Q1 asks about the relationships between the different entities involved in Algarve tourism. Q2 focuses on the main effects of national tourism policy for the Algarve as a destination, and specifically the effects of the regional development strategy from 2007 to 2013 for tourism (a governmental strategy designed specifically for the Algarve region). In terms of destination management, Q3 and Q4 question if any entity analyses the experience and satisfaction of tourists, as well as the main strengths, weaknesses of the Algarve tourism sector.

The fifth group is about destination image and branding. Within this group of questions, Q1 requests a phrase that could identify the Algarve to foreign visitors and Q2 asks for an opinion about the overall image of the Algarve. Q3 to Q7 enquire about the availability of any system of indicators concerning messages transmitted over the Internet, e.g. news, among other sources, the existence of sub-brands in the Algarve, the relevance of animation, what kinds of events could be important to develop the Algarve's image and how the Algarve brand is used in the context of other factors/products besides tourism. Q8 tries to understand if there exists any institution to manage the Algarve brand and what resources are used in this management.

The sixth and final group is about promotion and communication channels. Within this group, questions Q1 to Q4 try to identify the resources, main attractions and products used in the Algarve's promotion. Q5 is about the promotion strategies used in the UK market and the articulation between different stakeholders regarding tourism. Finally, questions Q6 to Q11 consider ideas to identify the Algarve internationally and the management of contacts involving channels, operators, travel agencies and the Internet, the necessary budget to do that, and in which areas of promotion have been applied.

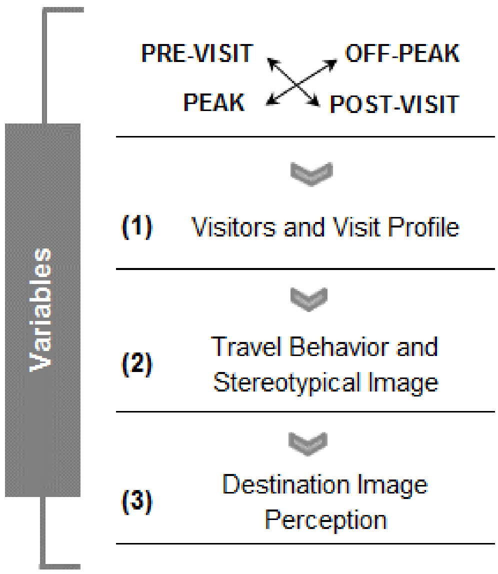
3.3.2.2 QUESTIONNAIRE DESIGN

Considering the objective to construct a profile of UK visitors to the Algarve and acquire an understanding of secondary image (pre-visit) as opposed to primary image (post-visit) of the Algarve as a destination, the research applies models of TDI to examine whether the image projected corresponds to the expectations created for the destination. It analyses if there exist differences between the profile and image of the two target markets: peak/off-peak seasons.

Prior to the questionnaire's conception and taking advantage of the Summer School called "Essex Summer School in Social Science Data Analysis", that took place from 11st to 23rd July 2010, ten semi-structured interviews were conducted to test the questions included in the questionnaire. The questions were administered to students participating in the summer school and covered knowledge about the Algarve and Portugal as well as the types of travel and holidays preferred. These interviews produced important inputs for the definition of the variables regarding a visit, visitor characterization and travel behaviour, among others, as detailed in Appendix 2: Preliminary Semi-structured Interview to Questionnaire Conception.

After these interviews the design of the questionnaires to be applied in the pre/post-visit and peak/off-peak was begun. Figure 3.4 summarises the organization of the groups of questions included in the questionnaires as applied to UK tourists at Faro Airport.

FIGURE 3.5 – STRUCTURE OF THE QUESTIONNAIRES



Source: Author.

The questionnaires comprise five categories of questions, which can be aggregated into three groups, as highlighted in the previous figure. The two initial groups contain visitor and visit characterizations, travel-behaviour data and the key figures expressed as a stereotypical image of the Algarve. The types of questions considered in these two blocks of the questionnaire are indicated in Table 3.5.

It is important to emphasize some of the sets of questions included. Regarding the socio-demographic characteristics of the tourists interviewed, the age, composition of the group and personal qualifications are among key issues considered. Due to the mature nature of the destination, the level of familiarity with the Algarve and the possible opposing characteristics of first-visit vs. post visit are important and further emphasized.

It was considered a set of questions about the economic profile of the visit. The questions include the daily spending, overall and divided by types of items, namely accommodation, food and drink, internal transport, shopping, entertainment and others (the two questionnaires applied – pre/post-visit – are available in Appendix 3).

TABLE 3.5 – STRUCTURE OF THE QUESTIONNAIRE: BLOCKS 1 AND 2

Questions for Blocks 1 and 2	
Demographic characteristics of the visitant.	Who decided to visit the Algarve.
Level of Familiarity with the Algarve.	Travel group composition.
How many times travel per year and which period.	Other destinations considered (competitive destinations).
Overnight in the Algarve.	Sources of information consulted.
Length of stay.	Stereotypical image of the Algarve.
Type of accommodation.	Booking behaviour (when and where).
Economic profile of the visit.	Return intention/Revisit Intention.
Place location preferences within the Algarve.	Willingness to recommend the Algarve.
Questions about First-time and Repeat visitors.	

Source: Author.

These variables are considered, taking into consideration the influential variables studied in the context of TDI and as described in Table 2.3 in Chapter 2.

Socio-demographic variables in relation to destination image are studied in multiple contexts by different authors, mainly by Stabler (1990), Um and Crompton (1990), Walmsley and Jenkins (1992), Stern and Krakover (1993), Baloglu and Brinberg (1997), Baloglu and McCleary (1999), Leisen (2001) and Baloglu (1997).

Destination familiarity or loyalty was studied by Chi and Qu (2008) and Baloglu (2001), among others, and first-time and repeat visitors by Chi (2012) and Beerli and Martín (2004). The willingness to recommend was studied by Valle et al. (2006) in the context of destination loyalty. Prayag (2009) studied image in the context of satisfaction and behavioural (return) intention. Stereotypical images were studied by Stepchenkova and Morrison (2006), in the context of affectiveness, uniqueness and common images.

The question about other destinations considered were introduced in order to identify the destinations in competition with the Algarve.

Finally, within this group, there is a set of questions regarding sources of information. The research follows the models of Baloglu and McCleary (1999) and Gartner (1993), which consider these factors as “stimulus factors” or “image forming agents”. Adopting these authors’ criteria, seven overt induced I sources of information were included, i.e. TV programmes, the Internet in general, advertisements, guidebooks, other books and films, social Web, (Web communities), followed by four overt induced II sources, i.e. travel agency/airline/hotel websites, tour-operator brochures, tourist information centres, embassies or consulates, one unsolicited organic source composed of friends and relatives’ recommendations, and finally one organic source, previous visit.

The third major block of questions in the structure of the questionnaire is related to the measurement of destination image, which for pre-visit is the perception of the image, and for the post-visit is the visitor evaluation of the destination image. Measuring mainly the attributes of the cognitive dimension, this block comprises a set of 23 attributes, plus one about the global evaluation of the destination.

The attributes were selected taking into consideration Echtner and Ritchie's (1991) study, in which the authors promote a comprehensive resumé of the main attributes generally used for destination image measurement. The attributes range from functional attributes (more tangible) to psychological ones (more intangible), the most common ones being related to the scenery and hospitality, present in 13 of the 14 studies listed in Echtner and Ritchie (1991). The research of Gallarza et al. (2001) was also taken into consideration to identify the main attributes regarding destination image, where the authors promote a comparison of 25 studies. Figure 3.6 identifies the attributes considered in the actual research/questionnaire, compared with the ones listed by Gallarza et al. (2001):

FIGURE 3.6 – POSITIONING OF THE ATTRIBUTES USED WITHIN THE STATE OF THE ART

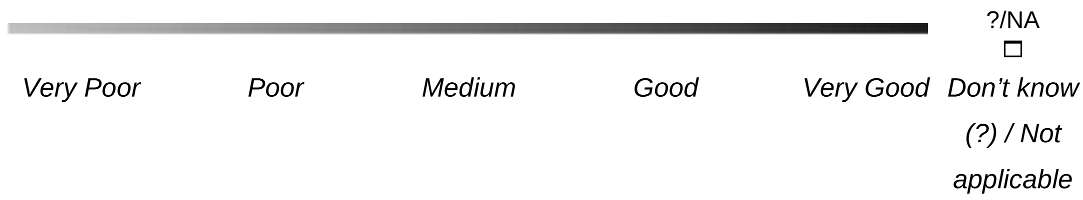
Authors \ Attributes (Functional ↔ Psychological)	Variuos activities	Landsape, surroundings	*Land use planning*	Nature	Cultural attractions	*Public Spaces Cxonservation*	Nightlife and entertainment	Shopping facilities	Information available	*Signposting*	Sport facilities	*Urban cleanliness*	Transportation	Accommodation	Gastronomy	*Health Services*	Price, value, cost	Climate	Relaxation vs Massification	Accessibility	Safety	Social interaction	Resident's receptiveness	Originality	Service Quality	**Total**
1. Crompton (1979)													✓				✓	✓	✓		✓			✓		**6**
(…)																										
25. Baloglu and McCleary (1999)		✓			✓		✓	✓	✓					✓	✓		✓	✓	✓		✓		✓			**11**
Total	8	19		12	19		16	15	4		15		8	15	15		16	12	12	12	10	7	21	7	3	
26. Custódio (2014)		✓	✓		✓	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓	✓			✓		✓			**16**
Sub-total by group	Functional: 141														Psychological: 118											

Source: Adapted from Gallarza et al. (2001: 63).

Considering the listed attributes concisely shown in Gallarza et al. (2001), the current research added land-use planning, signposting, entertainment, urban cleanliness, public-spaces conservation, public accessibility, health services and overall classification. Regarding the list of Echtner and Ritchie (1991), political stability and question about family or adult orientation were not considered, because these were not mentioned as relevant in the interviews or in pilot survey.

All the attribute questions were measured on a proxy-to-continuum scale from Very Poor to Very Good and included in a database from 0 to 10 points. To enable measuring the questions on a continuum scale instead of using an interval scale, a ruler was used and respondents were asked to mark their opinion with an X (anywhere along the ruler) as shown in Figure 3.7:

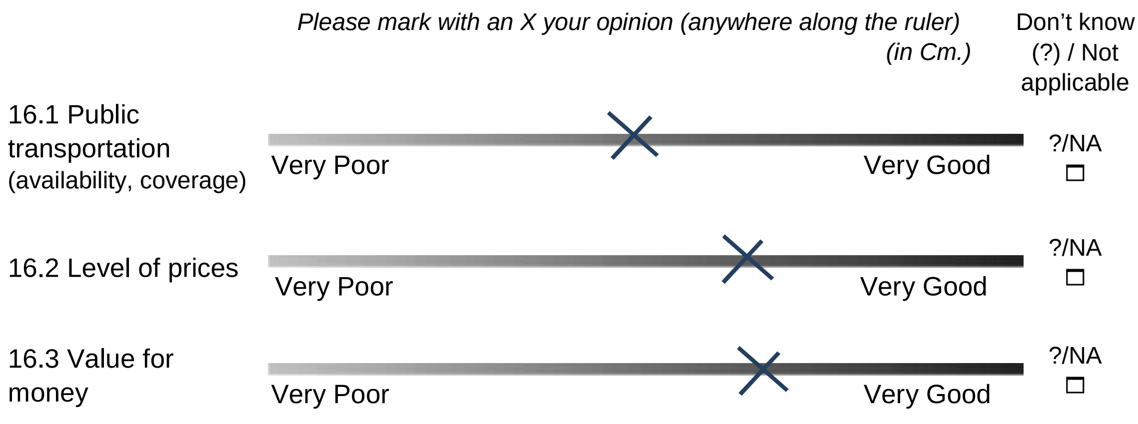
FIGURE 3.7 – LIKERT SCALE TRANSFORMED INTO A PROXY TO CONTINUUM SCALE: THE RULER



Source: Author.

Three examples of the attributes used to measure cognitive image are listed in Figure 3.8 as evidence of the practicability of using a ruler and thus enabling measuring the questions on a continuum scale.

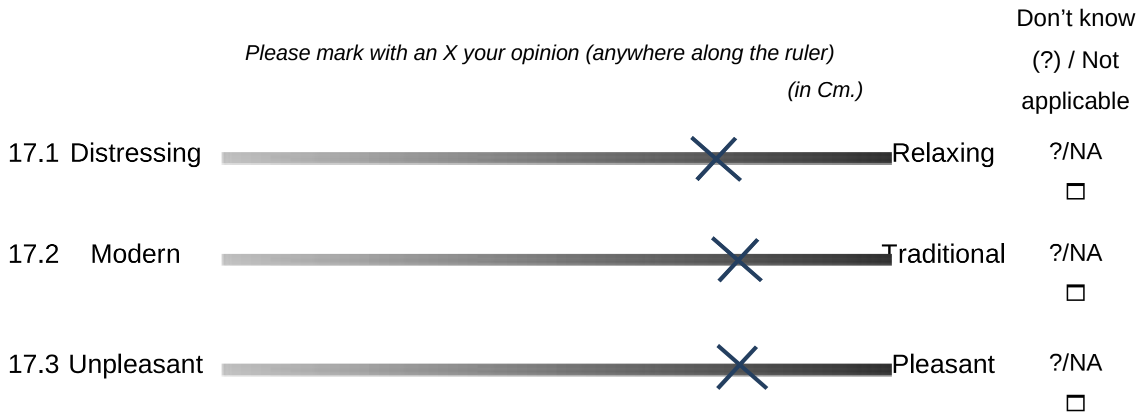
FIGURE 3.8 – EXAMPLE OF THREE ATTRIBUTES USED IN THE QUESTIONNAIRE TO MEASURE COGNITIVE IMAGE ON A CONTINUUM SCALE



Source: Author.

A second set of questions was introduced afterwards. This group tries to measure affective destination image as proposed by Baloglu (1996) and used by Russel (1980) as the "circumflex model of affect" and Walmsley and Jenkins (1998) in Kastenholz (2002). It is constituted by a set of seven bipolar adjectives measured using a ruler. These kinds of scales are called semantic differential. Three examples of the attributes used to measure affective image are listed in Figure 3.9.

FIGURE 3.9 - EXAMPLE OF THREE ATTRIBUTES USED IN THE QUESTIONNAIRE TO MEASURE AFFECTIVE IMAGE ON A CONTINUUM SCALE



Source: Author.

Finally, a qualitative view was introduced into the questionnaire. Tourists were asked to mention three keywords that they associate with the Algarve. This open-ended question enables the researcher to confirm whether the structured questions of the questionnaire consider all the main attributes, giving an idea of the stereotypical image of the Algarve. This picture enables receiving a free description of the destination for future branding strategies. The other open-ended questions probe: other destinations considered besides the Algarve (competitive destinations), decisive factors for visiting the Algarve, place location preferences within the Algarve, and websites used to obtain information about the Algarve.

After the visit, a new questionnaire was (re)issued to tourists at Faro Airport (departures), in order to collect data on destination image performance, i.e. TDI after a destination experience. This questionnaire had the main objective of measuring the performance of the destination in terms of TDI expectations in order to understand if the destination is above or below tourists' expectations of the destination. The assessment of these two questionnaires reveals the Algarve's current destination positioning in the minds of visitors. Questionnaire distribution and information collection were performed over a two-season period, peak and off-peak seasons.

3.4 DATA-COLLECTION PROCEDURE

3.4.1 FIELD RESEARCH

The field research is a central part of this research. It took around six months to complete and required intensive work regarding the administrative processes to book all the interviews and obtain the questionnaire administration authorizations at Faro International Airport. The emails requesting these authorizations are available in Appendix 4.

The mixed methodology started with the semi-structured interviews. Ten semi-structured interviews were administered to students participating in "Essex Summer School in Social Science Data Analysis" that took place from 11st to 23rd July 2010, to reinforce the adequacy of the questions introduced to the questionnaire, covering knowledge about the Algarve and Portugal, as well as preferred types of travel and holidays. This action produced important inputs for the definitions of the variables regarding visits, visitor characterization and travel behaviour.

Next, five semi-structured interviews with the stakeholders were undertaken. It was necessary to send an email explaining the context of the work and the main output sought. After sending this email, a telephone call was made to book a specific day for an interview according to the availability of the interviewees (see Appendix 5 regarding the email to arrange interviews) as detailed in Figure 3.10.

FIGURE 3.10 – FIELDWORK METHODOLOGICAL PHASES

Phases	Methodology	
1	**Multi-approach definition and preliminary data research (qualitative)**	
Carried out 10 interviews to students of the summer school to help define the questions to introduce in the questionnaire. Carried out 5 semi-structured interviews to the main tourism organizations of the Algarve, public and private (e.g. the private hospitality sector organization, the Algarve Tourism Board and the Algarve Regional Development and Planning Organization).		
2	**Multi-approach definition and preliminary data research (quantitative)**	
Carried out the construction of a questionnaire		
3	**Fieldwork**	**Empirical data collection (Quantitative)** **Empirical data collection (Qualitative)**
Empirical approach based on data collection from questionnaires distributed in two periods to the tourists who fly between Faro Airport (Algarve) and Exeter Airport (UK). This method of collection was only possible due to the authorization from Faro Airport Administration to collect the questionnaires in the Baggage Claim (arrivals) and in the Check In (departures).		

Source: Author.

The time estimated for each interview was about one hour; however, some of them took more than that, depending on the feedback. Some interviewees remained focused on the questions while others liked to talk about topics related to the theme. A shorter interview took one hour and a longer one about three hours; all took place at the interviewee's office. The conversations did not always follow the pre-defined order of the script. The interviews were held between May and June 2011, as illustrated in Figure 3.11.

Self-administrative questionnaires were carry out by a group of experienced students who were specifically trained to undertake this fieldwork. The questionnaires were administered to UK tourists during a four-month period (from July to October 2011) on all Saturdays and Wednesdays at Faro International Airport. These were the days that Flybe flies from Exeter to Faro and back.

FIGURE 3.11 – QUESTIONNAIRE AND SEMI-STRUCTURED INTERVIEWS

Interview and Questionnaire Administration

Regional semi-structured interviews

- Between the months of May to June 2011
- Five semi-structured interviews with an average duration of 2 hours each.

International Faro Airport Questionnaires

- Between the months of July to October 2011
- **Pre-visit:** At the Baggage Claim: 221 questionnaires
- **Post-visit:** At the Check-in: 495 questionnaires

Source: Author.

The pre/post-visit surveys were conducted by the same students using the same method to distribute the questionnaires. Due to time and budget limitations and considering the short period of time that visitors take in the check-in and baggage claim area, this method was considered the most suitable and reliable to use. As the researcher could not control the completion of all questionnaires, the main limitation of the self-administered questionnaires is the possible existence of missing values when compared, for instance, with the researcher administered questionnaires. However, considering the limited period of time that the visitors spend in the check and baggage claim this method enabled the collection of a larger number of questionnaires in a limited period of time.

The questionnaires were administered in the check-in queue and in the baggage claim area near the baggage carousels. This innovative approach (particularly the baggage claim) was assumed as the most efficient considering the mentioned limitations and was only possible due to the support and commitment of the Faro International Airport management board.

It is important to state that this approach follows similar studies conducted by several authors in different contexts, namely Yilmaz et al. (2009) who studied the relation between the pre/post-visit image regarding Antalya. The authors collected the data in arriving and in departing in the transfer buses. A total of

1,237 questionnaires were collected 601 in the pre-visit and 636 in the post-visit. Kim et al. (2006: 90) referring to the pre/post-visit samples stated "it is not uncommon to see different random samples utilized for longitudinal studies on perceptual or attitudinal changes over time (Ritchie & Smith 1991; Ritchie & Lyons, 1987). Bobbie (1998) categorizes it as a trend study".

The questionnaire was written in English with a small introductory text explaining the main objectives of the research. A pilot questionnaire was applied on 16th July 2011 (Saturday) to test the comprehension and survey time administration. As all the questions were comprehensible, the collection of that day was considered valid.

3.4.2 Sampling Methods

Sampling is generally used in research as a way to reduce costs and time instead of asking the whole population. Yakushiji (2010) explains that a sample is a (representative) group in a considered population. Bryman and Bell (2007) and Neuman (2003) define sampling as a fraction of data that is taken from a large population.

The population considered in the present research is tourists with their residence in the UK who travel to the Algarve by plane. The sample is UK residents who travel to the Algarve, coming from and returning to Exeter airport during the period from July to October 2011. According to Faro International Airport's Management Control Department, during this period the total numbers of passengers that travelled from and to Exeter reached totals of 5,843 disembarked passengers and 6,293 embarked passengers.

There are different types of sampling methods depending on the use of the sample to extrapolate results. A general distinction is made between purposive or non-probability sampling and probability sampling.

Wheeler et al. (2004: 45) state that "in the case of non-probability sampling, sample units are mainly selected for economy and convenience, while at the same time hopefully representing the characteristics of the population". These authors note that the reliability of this kind of sampling depends on the "skill and knowledge of the researcher". Zikmund (2003) and Jennings (2001) state that in this kind of sampling tourists are selected on the basis of convenience, or proximity to the researcher.

There are three main types of non-probability samples: convenience, purposive and quota sampling. A convenience sample is known as a technique in which the researcher uses the means available to study a particular subject. Normally in this technique the researcher is considering convenience, plus it is less expensive than other types of sampling.

Probability sampling is where the elements of the population selected have an equal or known chance of being selected to be part of the sample. Examples of this kind of sampling are simple random, systematic, stratified and cluster.

In this case, convenience sampling was chosen, considering time constraints and accessibility, due the need to apply the questionnaire in the period of existing flights from Exeter to Faro, and back. The sample size in this research was decided by taking into consideration the authorizations granted at Faro International Airport and the available flights from Exeter to Faro. Sekaran (2003) considers that the sample size for a population of half a million must be at least 382 to 384 samples. In multivariate analysis, the sample size should be at least ten times as large as the number of variables in the study.

The following tables show the schedule for data collection at Faro International Airport, along with the day-to-day work and the matching number of questionnaires administered in the pre/post-visit samples – Table 3.6 – and peak/off-peak samples – Table 3.7.

On data-collection days the researcher had the collaboration of three University of Algarve bachelor students to help administering the questionnaires to tourists.

TABLE 3.6 – SAMPLING COLLECTION FOR PRE/POST-VISITS

Date of Collection	Number of Questionnaires	
	Pre-visit	Post-visit
16.07.2011	13	30
20.07.2011	11	28
23.07.2011	12	20
27.07.2011	20	24
30.07.2011	4	21
03.08.2011	9	18
06.08.2011	13	21
07.09.2011	9	28
10.09.2011	21	29
14.09.2011	-	27
17.09.2011	7	24
21.09.2011	11	27
24.09.2011	17	32
28.09.2011	5	34
01.10.2011	2	18
05.10.2011	16	16
08.10.2011	13	16
12.10.2011	5	13
15.10.2011	15	16
19.10.2011	4	24
22.10.2011	11	15
26.10.2011	3	14
Totals	**221**	**495**

Source: Author.

As shown in Table 3.6, on 22 days the research collected 495 questionnaires at the check-in area (post-visit) and 221 at the baggage claim area (pre-visit). The difference stems from the relatively harder task in the baggage-claim area. Tourists have just arrived, are naturally anxious to pick up their luggage and want to start their holiday in the Algarve and/or meet their friend and relatives. Despite this extra difficulty, the global receptiveness of the tourists was very good and both sample sizes and content achieved consistent figures to support the data analysis procedures and the reliability of the results.

TABLE 3.7 – SAMPLING COLLECTION FOR PEAK/OFF-PEAK VISITS

Date of Collection	Number of Questionnaires	
	Peak	Off-Peak
16.07.2011	43	N/A
20.07.2011	39	N/A
23.07.2011	32	N/A
27.07.2011	44	N/A
30.07.2011	25	N/A
03.08.2011	27	N/A
06.08.2011	34	N/A
07.09.2011	37	N/A
10.09.2011	50	N/A
14.09.2011	27	N/A
17.09.2011	N/A	31
21.09.2011	N/A	38
24.09.2011	N/A	49
28.09.2011	N/A	39
01.10.2011	N/A	20
05.10.2011	N/A	32
08.10.2011	N/A	29
12.10.2011	N/A	18
15.10.2011	N/A	31
19.10.2011	N/A	28
22.10.2011	N/A	26
26.10.2011	N/A	17
Totals	**358**	**358**

Source: Author.

Finally, and as shown in Table 3.7, the sample division between peak/off-peak was equally balanced, with both samples achieving 358 tourists/ questionnaires. The season division was considered to be mid-September and the figures – a total of 716 questionnaires - were again consistent to support the data-analysis procedures and future results' reliability.

3.5 Data Analysis

Different methods of analysis were considered depending on the research objectives. These included descriptive methods, content analysis, factor analysis, independent samples t-test and chi-square. Statistical Package for the Social Sciences (SPSS) was used to analyse the quantitative data from the questionnaires.

The missing values were all screen out since the beginning. As the questionnaire was self-administrated some questions were not answered and were coded as "99" in the SPSS as missing values. So, they were not use in the calculus.

Focusing on content analysis, this technique has the main objective to reduce the material's bulk in order to analyse the information in more detail (Burton, 2000; Flick, 2006). Bowdin et al. (2006) distinguish two styles of content analysis: quantitative content analysis and qualitative content analysis (similarly called semiotic analysis). Quantitative analysis is linked to the physical presence of elements that can be counted and recounted to reveal the surface meaning of the text. In the current research, content analysis was quantitative through semiotic eyes. The coding was undertaken manually, using Excel software as a support tool. This instrument was used to analyse the semi-structured interviews and open-ended questions contained in the questionnaire.

Factor analysis was performed to derive the underlying dimensions of Algarve's destination post-visit image. The extraction method used Principal Component Analysis with Varimax rotation. Factor analysis is able to reduce a number of observable variables (listed image attributes) to a smaller number of new non-observable variables (latent variables) called factors, in that way identifying a correlation or covariance standard between the variables. According to Weeler et al. (2004), a matrix is a way of confirming the strength of the correlation between the variables considered in a group of observations. In order to assess the quality of the correlations between variables two important measures were considered: Bartlett's test of Sphericity and Kaiser-Meyor-Olkin (KMO). Pallant (2007) explains that Bartlett's Test of Sphericity must be significant at $P<0.05$ and Kaiser-Meyor-Olkin (KMO) at between 0.0 and 1.0, with 0.6 being suggested as the minimum appropriate value for a valid factor analysis.

Maroco (2003) notes that Bartlett´s measure tests the null hypotheses that the original correlation matrix is an identity matrix, in which the determinant is equal to 1. The higher the difference between the matrix of sample correlations and the identity matrix, the higher will be the proportion of variance explained by common factors. According to this author, correlations of 0.8 can be considered reasonable. The Kaiser criterion was considered. With this criterion, factors with an eigenvalue of less than 1 are considered insignificant and the factor tends to have a high degree of variation.

TABLE 3.8 – DATA-ANALYSIS METHODS USED

Methods	
Origin and type of Data	**Quantitative Methods**
Cognitive and Affective Image Structure evaluated through an proxy to a continuum scale	Descriptive statistics / Univariate Analysis. Factor Analysis / Multivariate Analysis. Content Analysis.
Differences between the TDI in the pre/post-visit, and peak/off-peak visitors	Independent Samples t-test
Cognitive and Affective Image measured through open-ended questions.	Content Analysis
Visitors Profile and Travel Behaviour crossed with First-time and repeaters and with Image Modification.	Chi-Square. Independent Samples t-test.
Origin and type of Data	**Qualitative Methods**
Semi Structured interviews. Open-ended questions.	Content Analysis.

Source: Author.

Cronbach's Alpha coefficient was analysed in order to test the internal consistency of each item that constitutes the factor. According to Hill and Hill (2002), values over 0.7 are considered reasonable. The full extent of the data analysis, quantitative and qualitative, considered during the research is presented in Table 3.8.

A t-distribution test and chi-square test were performed in order to determine whether there were differences between the TDI pre/post-visit, between first-time and repeat visitors, and regarding modification of the Algarve's image. These last two elements were crossed with the following variables, integrated in the questionnaire, regarding visitor and visit profiles:

- First-visit to the Algarve;
- Staying overnight in the Algarve;
- Type of accommodation in the Algarve;
- Sources of information to obtain information about the Algarve;
- Booking behaviour;
- Image modification;
- Return/revisit intention;
- Image attributes;
- Free WOM/willingness to recommend the Algarve.

Regarding the information collected in the semi-structured interviews, it was firstly made an informal analysis based on the transcripts of the recorded interviews (translated from Portuguese to English). In the second phase an abstract of the information was written, and finally the main issues were highlighted. This option did not follow any specific protocol and it is considered by Denzin and Lincoln

(2005) to be the best option when the qualitative analysis of text does not constitute the main focus of the research but plays a complementary role.

Concerning the questionnaires applied (pre/post-visit and peak/off-peak), five open-ended questions were included, namely: other destinations considered besides the Algarve (competitive destinations), decisive factors to visit the Algarve, place location preferences within the Algarve, websites considered to obtain information about the Algarve, and keywords that tourists associated with the Algarve, i.e. stereotypical image.

The process of data analysis was conducted with a classification from the particular to the general, namely, from singular elements (words) to categories, regrouping the adjacent elements to assign a title to the category, as suggested by Ferreira (2003). Finally, and according to Fortin (2000), there was resort to thematic analysis, called categorical analysis, in which was compared the frequency of some words (descriptions, names) previously grouped in meaningful categories. According to Ferreira (2003), a category is more frequently quoted as being more important the more respondents consider it.

3.6 Conclusion

Based on TDI research as a tool for tourism destination branding and competitiveness, the methodological approach selected by the current research used quantitative and qualitative research methods, depending on the data types and objectives assumed at each moment. As a result, mixed methods were applied, with the main advantages shown in Table 3.2.

With the research objectives as global orientation, the consistency of the methods chosen and their discussion and adaption to the case study of UK tourists' image assessment of the Algarve enabled the construction of a methodology that could support the fieldwork and subsequent data analysis. In fact, the research model of analysis and the research framework, respectively represented in Figures 3.1 and 3.2, constitute key definitions of the methodology, research design and methods.

Considering this methodological process and due to the specific object of the current research and the complexity of the destination/tourism/image research field, great emphasis was given to the design of the research instruments. Their importance was extremely high to the reliability of all the following research steps. The design of the semi-structured interviews and the questionnaires obeyed a careful and detailed structure, being linked as research instruments to collect data inputs to the image-evaluation model.

Despite the common difficulties and costs of the research fieldwork, which included direct interaction with regional stakeholders and about seven hundred tourists interviewed, the research made the necessary efforts to maintain objectivity in the criteria; this was a very rich moment in the research development, and the interactions were generally welcomed and supported by agents and tourists.

Finally, the data analysis was conducted and the use of different methods considered, including descriptive method, content analysis, factor analysis, independent samples t-test and chi-square. In all these methods common evaluation criteria were adopted and, in general, their application allowed the research to produce significant results and findings, as will be explained in detail in the case-study sections.

Chapter 4 The Algarve, an Introduction: Tourism Policy and Market

4.1 Introduction

This chapter aims to give an overview of tourism public policy and tourism sector organisation in Portugal, particularly in the region of the Algarve, followed by specific terms of the evolution and actual importance of the UK tourism market in the region. These subjects are respectively analysed in Sections 4.2 and 4.3.

This overview and evolution perspective, with a strong chronological component, is helpful to enhance the understanding of the development, principal constraints and challenges that the tourism sector faces in the Algarve. It was important to support the construction of the main questions in the stakeholders' semi-structured interviews, namely questions about policy and destination management, image and branding.

It starts with an analysis of the structure and organisation of tourism in Portugal, since its beginnings in the first quarter of the 20th century until the latest reorganisation in 2005, noting how its general structure and policy remain relatively constant to this day. In historical terms, the long period of dictatorship that existed in Portugal from 1933 to 1974 is particularly relevant, since it was the period that saw the foundation of most of the structures that were later transformed and evolved under democracy after 1974. It is analysed and contextualized by referring to different authors in order to reach a deeper and more comprehensive understanding of the role of tourism in the region and the country's framework.

Along with this policy and sector organization evolution, the presence of the UK market in the Algarve is a social and economic reality, particularly since the democratisation of the country, achieving a leading market position that persists even now. Being so significant, any public policy or organisational change within the region should not ignore or underestimate its effects on the UK market's demand dimension and composition.

4.2 TOURISM POLICY ORGANIZATION IN PORTUGAL

4.2.1 EVOLUTION OF TOURISM ORGANISATIONS IN PORTUGAL

Tourism has experienced about a century of structural organization in Portugal. According to the publication “90 years of Tourism in Portugal: To know the past, invest in the future”, published by the Council of Tourism Sector[3], the first public organizations created with the aim of planning and organizing the tourism sector were formed in 1911 and known as the Council of Tourism[4] and the Division of Tourism[5], the latter an executive body of the Council integrated within the Ministry of Furtherance[6]. The Council was first announced at the IV Congress of Tourism which took place in Lisbon at the Geography Society of Lisbon.

Previously a private organisation created in 1906, it had an important role in the organisation of tourism, run as the Propaganda Society of Portugal[7] and created during the last years of the Monarchy of Portugal. This society played an important role in the early years of the I and II Republics (1911–1927). According to Pina (1988), in Machado (2010: 225), this organisation sought to develop “incentives to promote tourism actions (posters, leaflets, brochures, educational travel) and training in hospitality, aiming at the creation of a Portuguese tourism product, congregating resources, infrastructure and promotion, consistent with the available attractions, warning the Tourism Department to detect needs”. The author considers that this organisation represents an “important power exercise in Tourism during the I Republic”. Pires (2003: 37), quoting Marques (2000), states that the “college of private nature, was the embryo of the Portuguese tourism organization. It has as objective to promote the country, especially through the tourism”.

[3] *Conselho Sectorial do Turismo.*

[4] *Conselho de Turismo.*

[5] *Repartição de Turismo.*

[6] *Ministério do Fomento,* the former designation of the Ministry of Economics.

[7] *Sociedade de Propaganda de Portugal*.

According to the Council of Tourism Sector (n.d), the first Algarve tourism congress took place in 1914. During this event, three places for gambling in Portugal were selected, namely Figueira Foz / Buçaco and Cascais / Estoril / Sintra, and in the Algarve at Praia da Rocha / Monchique. In 1917 the first Portuguese *Bureau de Reseigments* abroad opened in Paris, followed by offices in Bordeaux, Antwerp, London and Rio de Janeiro, an initiative of the private sector with efforts from the Propaganda Society of Portugal.

Despite this apparent open perspective and according to Machado (2010), the importance of the Propaganda Society of Portugal was overshadowed after the 1930' as a result of the dictatorial regime implemented by Oliveira Salazar, designated the New State[8], a regime that prevailed in Portugal from 1933 to 1974. The New State was dropped after the 25 April 1974 Revolution, known as the "Carnation Revolution". In the New State, propaganda was considered "essential to the regime's survival, and had a face that was clearly public and centralised"; tourism, with small exceptions, was synonymous with "regulation, control, ordination, classification, supervision and sanctioning". Given these conditions, in May 1927 the Department of Tourism was integrated into the Ministry of the Interior[9] (Machado, 2010: 226, 235). According to Pires (2003: 38), until the 1930s, "it will not be an exaggeration to say that the regulation of tourism activity somehow went adrift and zigzagged through filing-cabinet drawers and boiling political arenas".

Machado (2010: 235) explains how, in 1929, "the promotion and advertising of Portugal abroad become public competencies assumed by the Ministry of the External Business". The beginning of the 1930s saw the promotion of Portuguese tourism abroad with the creation of the "Houses of Portugal", resulting from the work of the Propaganda Society of Portugal.

In 1933, the National Propaganda Secretary (SNP) was created, coordinated by António Ferro, one of the first mentors of Portuguese image projection abroad. The SNP developed a coherent project for the projection of an image of Portugal,

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[8] *Estado Novo*.

[9] *Ministério do Interior.*

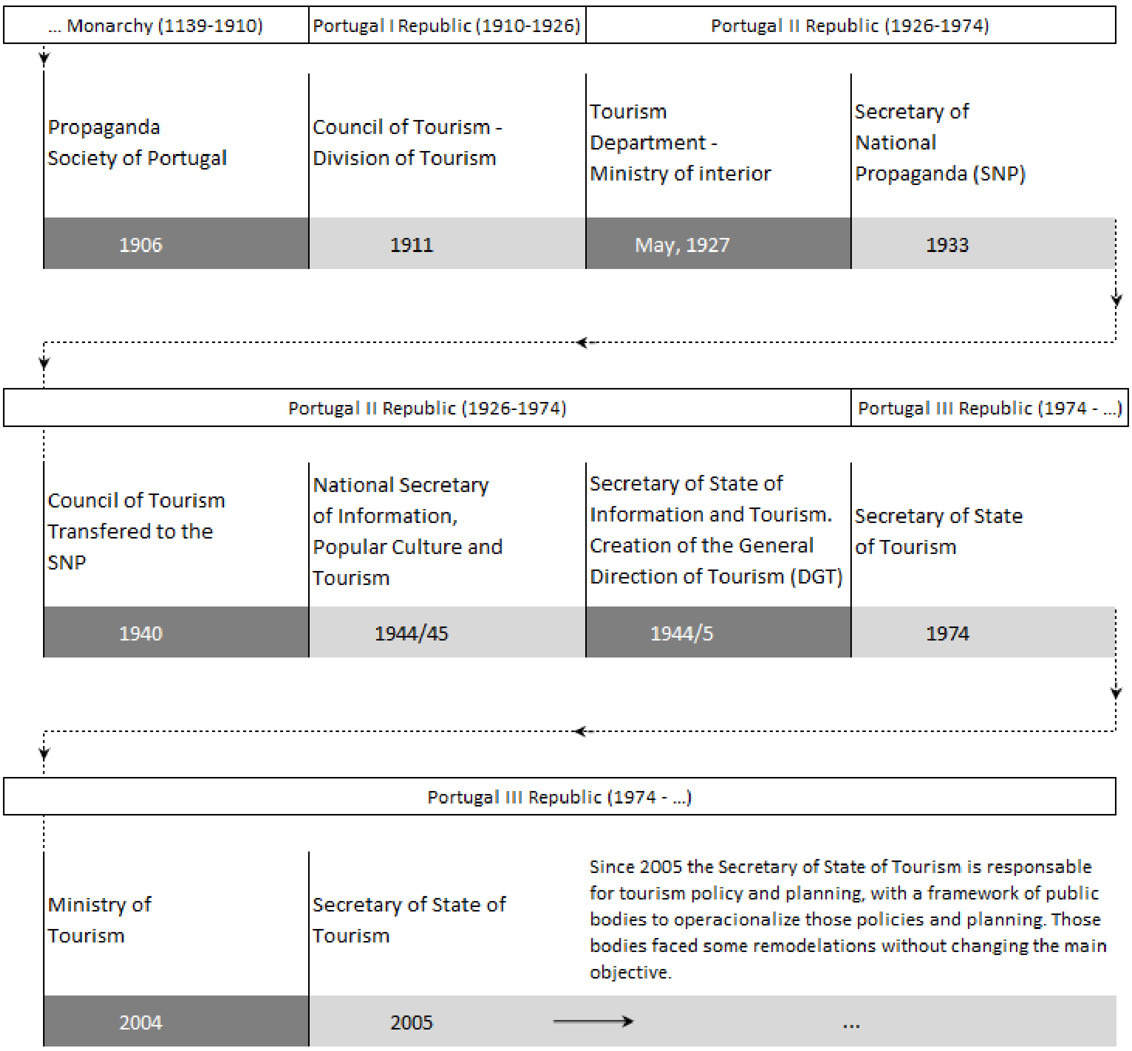
with special care given to Portuguese participation in universal expositions, as well as the promotion of cultural fortnights in European cities. Pina (1998), in Pires (2003: 41), states that "in his anticipated project for national marketing – a comprehensive philosophy whereby all sectors, using all means, should compete to launch the country's image – tourism should not be ignored" and "António Ferro is, above all, the carrier of a global project for promotion of the country's image" (Pina 1988 in Pires, 2003: 41). Although from this perspective the use of tourism is an instrument for a (positive) image projection policy by the New State, it was not consensual. Melo (2001), quoted by Pires (2003: 39), states that "tourism was used by the New State to launch the country's image abroad, and was a relevant element of 'transmutation of the image´ of the country by the regime that institutionalized itself".

Pires (2003: 40), quoting António Ferro (1949), states:

> "If external tourism can be considered non-existent, in the near future, the same could not be said about domestic tourism, which has reached the time to develop, not only because without it ... it will never be possible to defend ourselves from the fluctuations of external tourism, but also because we can find, in that healthy distraction, educationally and even economically ... the necessary valve for the fatal depression caused by the war ... the countries of tourism, such as Portugal and Switzerland, should, in fact, take advantage of this forced break to prepare or renovate themselves for the fatal euphoria of the new after-war. After many years of hell the hour for those countries that had been wise in transforming themselves into paradises, has come (...). For this reason (...) we begin right away to put in practice the play that will be performed later on in front of the foreign tourists, just as it is done, sometimes, in the small towns where plays are presented to be shown later in the capital".

According to the Council of the Tourism Sector (n.d.) in 1940, the National Council of Tourism was transferred to the National Propaganda Secretary with "responsibility for advertising the Portuguese space", and in 1945 the National Propaganda Secretary adopted the title "National Secretary of Information, Popular Culture and Tourism" (Pires, 2003: 39). This Secretariat was only reformed / extinguished in 1968, and tourism gained for the first time a higher hierarchical political status with a Secretary of State for Information and Tourism. In the same year, the General Direction of Tourism[10] was created, Decree Law 48686 of 13 November 1968, a Direction that lasted until 2005. After the 25 April Revolution, in 1974, the Secretary of State of for was created, which remains nowadays with the same designation and attributions.

FIGURE 4.1 – EVOLUTION OF THE TOURISM SECTOR ORGANIZATION IN PORTUGAL



Source: Author.

[10] *Direcção-Geral de Turismo.*

Until 2005, the political structure was more or less maintained with a brief exception in 2004 under the short XVI Constitutional Government (2004-2005), when tourism had its own Ministry. Only some of the department's hierarchical dependence on the Secretary of Tourism were affected, with the creation and abolition of some structures.

In the private sector, the main change was in 1995, with the creation of a national tourism organisation for the private sector, the Confederation of Portuguese Tourism, in which regional private tourism associations and sector national associations (restaurants, rent-a-car etc.) are represented.

In terms of promotion, the ICEP – Institute of Foreign Trade of Portugal[11], an organization created in 1982 with the aim to "promote the implementation of measures of foreign trade policy to increase national exports" (Diário da República, Decreto-Lei No. 115/82 of 14 April: 879) – was responsible for the promotion of Portugal abroad until 2004, consistent with the General Direction of Tourism and Regional Tourism Organizations. The Decree Law No. 77/2004 of 31 March transferred these attributions to the Portuguese Tourism Board. AIECEP itself was created in 2007 by Decree Law No. 245/2007 of 25 June, absorbing the functions of the Portuguese Agency for Investment created in 2002 and the former ICEP's functions. AICEP promotes abroad using the brand name AICEP Portugal Global. Nowadays, the main competencies of this structure are to "promote the internationalisation of Portuguese companies and support their export activities, to capture structural investment and promote the image of Portugal with initiatives that create value for the country"[12].

Nowadays, the AIECEP has about 49 offices around the world but, curiously, does not have any direct tourism attributions. So at the present time, the image projection of Portugal is divided and tourism has a particular institution to do that, the Portuguese Tourism Board.

[11] *Instituto do Comércio Externo de Portugal*.

[12] Source: http://www.portugalglobal.pt/PT/SobreNos/Paginas/SobreNos1.aspx, Accessed on 28th January, 2011.

4.2.2 Portugal Tourism Policy: Recent Trends 2005–2012

In terms of policy and public administration, tourism has been a dependency of the Economy Ministry, with the title Secretary of State for Tourism, with a brief interruption in 2004–5 with the creation and extinction of the Ministry of Tourism.

The Ministry of Economy is responsible for the industry, trade, tourism and services sectors. It has four Secretaries of State within it, namely: the Secretary of State for Industry and Development, the Secretary of State for Trade, Services and Consumer Defence, the Secretary of State for Tourism and the Secretary of State for Energy and Innovation.

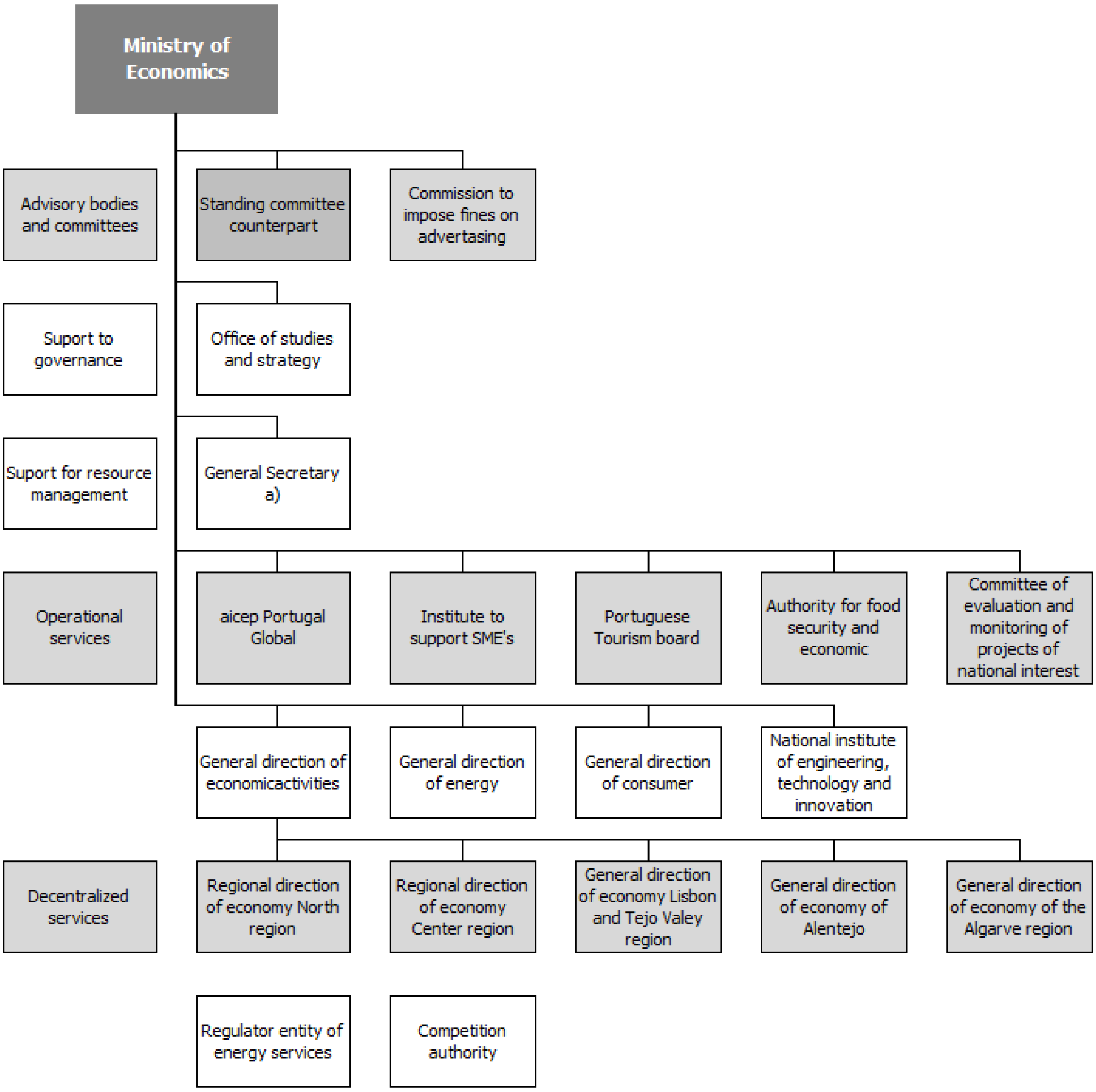
In 2005, in the context of modernization of the public administration, it engaged in restructuration a number of public bodies. Within the scope of a national programme called "Programme of Restructuration of the Central Administration of State", with the Portuguese acronym PRACE[13], tourism public bodies were also considered within these changes. The resolution of the Council of Ministers No. 124/2005 of 4 August, that approved PRACE, stated that the main objective of this programme was "citizenship promotion, economic development and quality of public services, with efficiency gains, via simplification, rationalization and automation that permit a decrease in the number of services and resources affected" (Diário da República, Decreto-Lei No. 67/2008 of 10 April: 2171).

With this programme, PRACE, a number of institutions and public bodies were reintegrated or extinguished, and many ministries, including the Economy and Innovation Ministry, were restructured. Decree Law 67/2008 of 10 April recognised "the existence of a notorious excessive number of local and regional offices of tourism, cut some of them, a necessary critical dimension in terms of the consistency of the tourism product supplied and the resources and available means of action" (Diário da República, Decreto-Lei 67/2008 of 10 April: 2171).

[13] *Programa de Reestruturação da Administração Central do Estado*.

Figure 4.2 presents a chart showing the organization of the Ministry of Economics.

FIGURE4.2 – MINISTRY OF ECONOMICS CHART ORGANIZATION



Note: This Ministry comprises four Secretaries of State, namely, the Secretary of State for Industry and Development, the Secretary of State for Trade, Services and Consumer Defence, the Secretary of State for Tourism and the Secretary of State for Energy and Innovation.

Source: Diário da República, Resolução do Conselho de Ministros No. 39/2006, Annex XII: 2859.

As a result of this process, six national entities related to tourism were abolished, namely: the General Direction of Tourism[14]; the Council for Tourism Activities[15];

[14] *Direcção-Geral do Turismo.*

[15] *Conselho para a Dinamização do Turismo.*

the National Commission for Gastronomy[16]; Investment and External Trade for Portugal[17]; the Institute of Tourism Training I.P.[18]; the General Inspection of Gambling[19].

Following the public restructuring implemented under PRACE, the Portuguese Decree Law nº 67/2008 of 10 April created touristic regional areas in mainland Portugal. In the first article, on page 2171, it is stated that “the present Decree Law establishes a juridical regime for regional touristic areas in mainland Portugal, their delimitation and characteristics, and a juridical regime for the creation, organization and action of regional entities of tourism”. In this Decree is seen the creation of five regional entities of tourism, namely, North, Centre, Lisbon and Tejo Valey, Alentejo and Algarve, which match the five territorial spaces considered for statistical purposes by the European Union – NUT II and six poles.

These five regional entities replace the previous 19 touristic regions. Each of the five regional entities of tourism, as defined in Decree Law 67/2008, page 2171, has a legal nature expressed as a “management entity, the collective person of a public direct of territorial body, with administrative and financial autonomy and its own assets”. This Decree law establishes that, in addition to the internal skills established by the regional entities, protocols and contracts can be established by the Portuguese Tourism Board and other entities for the development of their activities.

In short, they should contribute to “tourism valorisation”, the development and implementation of the National Tourism Policy, “the development of studies” and “boosting tourism resources” (Diário da República, Decreto-Lei 67/2008 of 10 April, article No. 5: 2172). Annex 1 the 3rd article develops the mission and assignments of the Algarve Regional Entity.

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[16] *Comissão Nacional para a Gastronomia.*

[17] *ICEP-Portugal.*

[18] *Instituto de Formação Turística I.P.*

[19] *Inspeção Geral de Jogos.*

The two autonomous regions (islands) of the Azores and Madeira have a Regional Direction which differs from the five regional entities above, in prosecution of the definition and execution of a regional governance policy, justified by their regional autonomy. At the same time as the regional re-organization, the national bodies were rearranged. In this restructuring, Turismo de Portugal, IP (Portuguese Tourism Board) assumes the responsibilities of the national tourism authority and is responsible for the promotion, valorisation and sustainability of tourism activities, combining in one unique entity all the institutional responsibilities related to tourism, from supply to demand[20].

As stated in article No. 4 of Diário da República, Decreto-Lei nº 141/2007 of 27 April, the main areas (mission) of the Portuguese Tourism Board are:

1. Support investment in the tourism sector;

2. Development and verification of tourism infrastructures;

3. Coordination of the domestic and external promotion of Portugal as a tourism destination;

4. Training and development for human resources in the sector;

5. Regulation and control of gambling.

This mission gives competencies to the Portuguese Tourism Board in six main areas/departments, namely: products and destinations, supply qualification, investment, promotion, training and gaming inspection. Image is integrated within the area of promotion.

As a consequence, the Portuguese Tourism Board integrates events, tourism fairs, outbound foreign press, tourism information, regional agencies for promotion and domestic tourism campaigns. Foreign promotion is done by the Portuguese Tourism Board alone or in coordination with seven regional agencies

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[20] http://www.turismodeportugal.pt/Portugu%C3%AAs/turismodeportugal/QuemSomos/Pages/QuemSomos.aspx, Accessed on 20th January, 2011.

created to promote regional foreign tourism. This system introduces private and regional funding into the Portuguese tourism sector organisation. Legally, those regional agencies have private rights, work without profit objectives and their funding comes from private and public bodies, namely the aforementioned regional entities of tourism, municipalities and the hospitality sector, among others. They are responsible for regional plans for foreign promotion, following a contract plan established for periods of three years.

Specifically in terms of promotion, the Portuguese Tourism Board's Department of Promotion is responsible for "proposals for the definition of a promotional strategy for Portugal and for regional and tourism products, for participation in international events and for the conception of a national plan of tourism, promotion, coordinating, executing and accompanying, in collaboration with public and private bodies, promotional activities, information and the image of Portugal as a destination, in Portugal and abroad" (Diário da República, Portaria No. 539/2007 of 30 April).

In terms of structural organization for the promotion of Portugal in foreign markets, the Department of Promotion of the Portuguese Tourism Board develops its activities in coordination with regional agencies of tourism (private and public partnerships) and with 20 offices of the AIECEP located in foreign markets (called teams in foreign markets), namely:

TABLE 4.1 – PORTUGUESE TOURISM OFFICES IN FOREIGN MARKETS

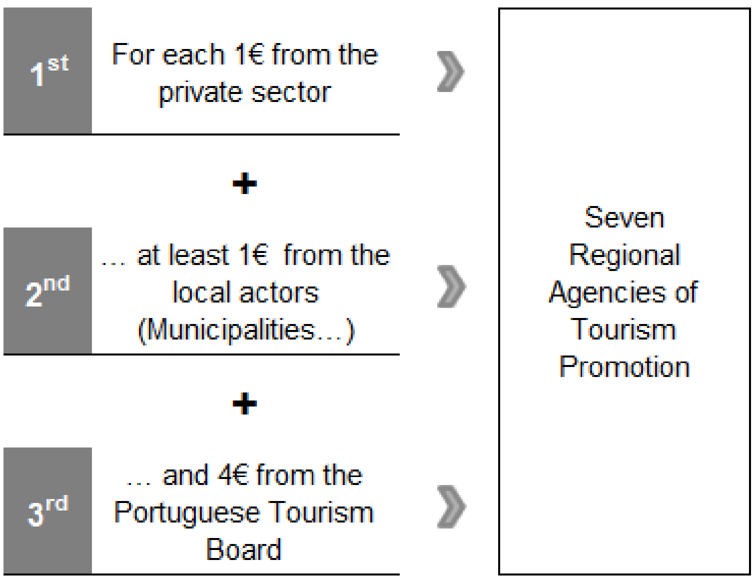
Tourism Office Locations	
Portuguese Tourist Offices in foreign markets	Germany (Berlin), Austria (Vienna), Switzerland (Zurich), Brazil (São Paulo), Spain (Madrid, Barcelona), United States of America (New York), Canada (Toronto), France (Paris), Netherlands (Hague), Belgium (Brussels), Ireland (Dublin), Italy (Milan), United Kingdom (London), Denmark (Copenhagen), Sweden (Stockholm), Japan (Tokyo), Czech Republic (Prague), Poland (Warsaw) and Russia (Moscow).

Source: Author

Within this activity, the latest public available data focusing on total investment in promotion date from 2009 and allowed check funds division in the main areas, with 38.8% for the promotion of Portugal as a destination, 31.2% for events and 30.0% through regional agreements/contracts, with an estimated total expenditure of 50 million euros (Source: Tourism Promotion: Training Action for Regional Entities of Tourism, 5 May 2009).

The process of regional agreements/contracts between the Portuguese Tourism Board and the seven Regional Agencies for Tourism Promotion (the Algarve Regional Agency was created in 2003) is based on agreement for a plan of promotion for the region over a three-year term. The rules of the model are made in agreement with the Portuguese Tourism Board, the Portuguese Tourism Confederation, the National Association for Tourism Regions[21], the Regional Secretary for the Economy of the Azores[22] and the Regional Secretary for Tourism and Culture of Madeira[23]. The funding of this plan is based on the following structure, called "Mechanism of flexible multiplier funding":

FIGURE 4.3 – FUNDING STRUCTURE OF REGIONAL TOURISM AGENCIES



Source: Author based on information of the Tourism Promotion: Training Action to the Regional Entities of Tourism, 5 May 2009.

[21] *Associação Nacional das Regiões de Turismo*.

[22] *Secretaria Regional da Economia dos Açores.*

[23] *Secretaria Regional do Turismo e Cultura da Madeira.*

The interest in this funding organisation lies in the contribution of the private sector to the promotion of tourism and regional involvement in foreign promotion through the seven regional agencies for tourism promotion. In general, the Secretary of State for Tourism defines overall tourism policy (as a dependency of the Ministry of Economics), and the National Bodies of Tourism fulfil this policy, primarily thought the Portuguese Tourism Board that has links with the exterior via a partnership with the AIECEP through foreign teams for tourism promotion. These offices have the following responsibilities:

TABLE 4.2 – MAIN ACTIVITIES OF FOREIGN OFFICES FOR PROMOTION

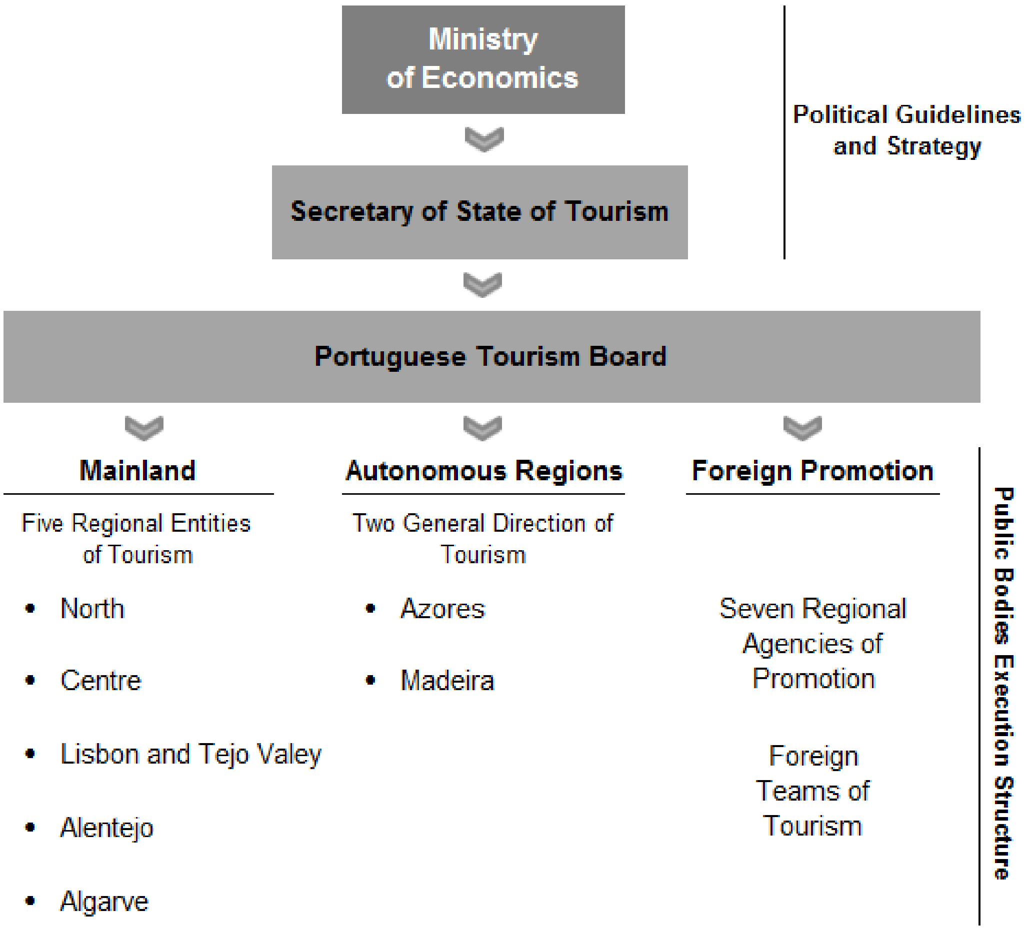
Scope	Main Activities
Management of contacts	Representation and management of a network of contacts. Detection of opportunities thought a constant activity of prospection. Public relations development actions via networking, in particular through the media.
Market Analysis	Collection, treatment and promotion of information about the market, competition and processes within the theme of tourism.
Approaches/Activities	Proposal for structured actuation and a properly reasoned approach and/or market development, with fixed goals.

Source: Author, based on information for Tourism Promotion: Training Action for Regional Entities of Tourism, May 5, 2009.

In summary, regional foreign promotion is assured by the Regional Agencies for promotion in association with the Portuguese Tourism Board, which manages and promotes Portugal's overall image.

The autonomous regions of Madeira and the Azores have their own main policies for tourism and the five mainland regional entities for tourism have responsibility, among other matters, for promotion of the regions in the domestic market. Regarding policy, these institutions of mainland Portugal follow the national policy plan and work under the orientation of the Portuguese Tourism Board, located in Lisbon.

FIGURE 4.4 – NATIONAL TOURISM STRUCTURE ORGANIZATION



Source: Author's elaboration, based on information for Tourism Promotion: Training Action for Regional Entities of Tourism, May 5, 2009.

In 2006 "The National Strategic Plan for Tourism (NSPT): For the Development of Tourism in Portugal" was presented and elaborated by the Ministry for the Economy and Innovation. This document seeks to "Underpin actions and achievements for sustainable growth of national tourism in the coming years, and to guide the activities of the Portuguese Tourism Board, the main public entity of the sector".

The document includes diagnostics, goals, five strategic axes and 11 projects. For the development of these strategies and goals, it recommends the intervention of multiple entities, both public and private. Considering the five axes along which the global strategy is proposed to be developed, they emphasize the importance of the relations between tourism and territory, brands, markets and distribution channels, human resources and, finally, scientific knowledge, as follows:

- Territory, destinations and products;
- Brands and markets;
- Resources qualification;
- Distribution and classification;
- Innovation and knowledge.

The 11 projects considered relevant to the National Strategic Plan for Tourism (2006), as represented in Table 4.2, aim to develop previously defined goals and axes:

TABLE 4.3 – PROJECTS OF THE NATIONAL STRATEGIC PLAN FOR TOURISM

Projects	
1. Products, Destinations and Poles	7. Quality Programme
2. Intervention in Tourist Areas of Interest (Urbanism, Environment, Landscape)	8. Excellence in Human Capital
3. Development of Distinctive and Innovative Content	9. Knowledge and Innovation
4. Events	10. Effectiveness of State-Enterprise Relationship
5. Air Accessibility	11. Enterprise Modernization
6. Brands, Promotion and Distribution	

Source: National Strategic Plan for Tourism (2006: 8).

In general, the NSPT identifies opportunities for and challenges to the tourism sector, namely consumer tendencies, transformation in the business model and the competition environment between destinations. Regarding consumer tendencies, it highlights the increase in the number of tourists, the ageing European population, the increase in short breaks and the shorter duration of stays, the increase spending on stays and the decrease in travel expenses, the search for diversified experiences and the increase in DIY (do-it-yourself) travel arrangements. In the business model, it mentions Internet disintermediation, low-cost developments and the hospitality business, examining marketing strategies, namely the segmentation of experiences. Finally, the competition between destinations has created the necessity for development mega-events in order to boost destination awareness, which creates the necessity for infrastructure and content development, and enlargement of the tourism experience (NSPT, 2006: 35-43).

4.3 Tourism Policy Organization in Algarve

4.3.1 Evolution of Tourism Organisation in the Algarve

With the airport's inauguration in 1965, the Algarve economy began a new cycle, namely the tertiary sector with strong growth in tourism arrivals. In 1966, the number of overnight stays in the Algarve was 69,272 and beds numbered 1964 in 3,690. Almost half a century later, in 2012, overnight stays were 14,326,774 and the number of beds was 106,625, representing, in this period, an annual average growth rate, respectively, of 15.5% and 7.4%. At the same time, in terms of economic activities developed in the territory, in 1960 the Algarve had 59% of the employed population working in the primary sector and 15% in the tertiary sector; in 2012, the relation was already more than reversed, with 76.1% of the population working in the tertiary sector and 5.4% in the primary sector (Statistics Portugal, 2014).

Even during the New State period, 1933–1974, with its policy of barriers to foreign input and ideas, this infrastructure was the beginning of the Algarve's openness to more distant markets, a facility that developed tourism, and especially UK tourism holiday options for sun and sea in the Atlantic on the southern border of Europe. A new destination was emerging.

FIGURE 4.5 – FRONT PAGE OF THE PROGRAMME OF THE INAUGURAL FLIGHT LONDON- FARO

Source: (Cunha, 2005: 66).

The policy and structural organisation of the sector follow tourism development in the Algarve region. Law No. 2082 of July of 1956 created commissions of tourism, local bodies of tourism to pursue "the tourism valorisation of the regions, seeking to take advantage of resources and advertising, encouraging the realisation of tourism promotion actions, the creation and conservation of leisure equipment, improvement in hospitality conditions, promoting and encouraging the construction of hospitality establishments and similar, to support establishments and organisations for tourism interest and verify the pursuit of activities and jobs related to tourism" (Machado, 2010 quoting article 5, Law 2082, 4 July 1956). These local bodies made interventions mostly on a local scale (municipality).

As stated by Cunha (2005: 119), "In 1965 when I initiated my activity in the tourism sector, the Algarve still had a tourism organisation provided for in the Administrative Code of 1940 – i.e. eight Municipal Commissions of Tourism ...

and three Councils of Tourism". According to this author, these institutions did not have any level of autonomy (financial or administrative).

In 1970, with the establishment of the Algarve Tourism Regional Commission[24] (CRTA is the Portuguese acronym), a tourism regional organization was created. As stated by Martíns (2005: 11), "similar to their counterparts, the Algarve Tourism Region proved to be essential to the entertainment and tourism promotion of the region, constituted as a collective person of public right with own assets and autonomous in administrative and financial standpoint". Decreto-Lei No. 114/70, of 18 March, fixes the Tourism Regional Commissions' role in "the creation of urban infrastructures appropriate to serve tourist centres no longer confined to the municipal scope, decisions about tourism establishments' location, camping parks and other forms of accommodation locations, the organisation of promotion directed towards internal and international tourism, choice of routes, calendar construction of all manifestations with an interest in tourism and many other measures to promote tourism; working only from the perspective of the overall territory of the Algarve, these are likely to be effectively planned and implemented".

Considering the time of its creation, this institution (CRTA) faced important challenges. As referred to at that time, the Algarve was a region that relied on subsistence agriculture and a fisheries economy. Considering this development stage, besides the general responsibilities related to tourism activity, the Algarve Tourism Regional Commission had the important role of developing a new infrastructure for the region. Decreto-Lei No. 114/70 of 18 March states (Cunha, 2005: 145): "Besides the attributions that the general law had settled for the tourism regions, the Algarve region had the responsibility of executing a works plan and urban infrastructures of touristic interest in which were included water supply, sanitation and roads". As an example, this actuation is still visible nowadays in the drain covers existing in Faro old town.

[24] *Comissão Regional de Turismo do Algarve.*

FIGURE 4.6 – DRAIN COVERS IN THE OLD CITY OF FARO MADE BY THE ALGARVE TOURISM REGIONAL COMMISSION

Credit: Fernando Perna, 14th February 2011. Old city of Faro, capital of the Algarve region.

The Algarve Tourism Regions kept the same structure until 2003 and the creation of the Algarve Tourism Association. As previously mentioned, this institution has responsibility for foreign tourism promotion in association with the Regional Entity of Tourism (created in 2008) and the Portuguese Tourism Board.

This association has as subject: “1.a) Algarve touristic and products promotion and divulgation, in all their strands, through the study, preparation and development of specific actions in foreign markets; b) Cooperation between public and private regional entities, in order to define the policy, goals and promotion strategies of the Algarve abroad”. It is stated that this entity exists to “protect the promotion of the Algarve Tourism brand” (Estatutos da Associação Turismo do Algarve, n.d.:1).

4.3.2 ALGARVE TOURISM POLICY: RECENT TRENDS 2005–2012

Regarding tourism policy as per the aforementioned National Strategic Plan for Tourism (NSPT) identifies the main difficulties in the Algarve’s performance diagnostics, namely: “Negative growth in overnight stays, low and declining occupancy rates and RevPAR (Revenue per Available Room), supply dependence on tourist aparthotels, fewer integrated resorts and hotels of international brands, necessity for hospitality requalification and the great weight of unlicensed beds (...) strong seasonality and foreign tourism demand stagnation, which leads to low occupancy rates and strong dependency on sun and sea products” (National Strategic Plan for Tourism, 2006: 25).

The NSPT (2006) identifies the main resources, distinctive factors and goals for the Algarve's tourism development, as summarised in Table 4.4:

TABLE 4.4 – THE ALGARVE IN THE NATIONAL STRATEGIC PLAN FOR TOURISM: RESOURCES, GOALS AND PRODUCTS

Main resources considered in the Algarve	
Beaches and cliffs.	Diversity in hospitality supply.
Golf courses.	Marinas.
Hospitality capacity out of high season.	
Goals	
Requalification with growth and value (increase expenditure by visitors).	Develop sun and sea image-builder places.
Multi-segmentation of sun and sea motivations and lengthen the season.	Increase diversity through new product development.
Reduce seasonality through golf and business tourism.	Potentiate integrate resorts with international hospitality supply.
Products	
1. Order development: Sun and sea	3. Order development: Golf
2. Order development: Business tourism	4. Order development: Nautical tourism, integrated resorts and residential tourism, health and welfare.

Source: National Strategic Plan for Tourism (2006: 75-79)

In 2009 the Algarve's alignment with the NSPT (2006) was presented. In this document, eight key axes for the Algarve's development were established, namely, target source markets, air accessibility, supply, environmental and urban quality, services quality and human resources, events and entertainment, content and promotion. In terms of target markets, the United Kingdom and Germany were identified as large strategic markets with the best contribution to tourism receipts, Spain and Ireland as markets of small dimensions although with large contributions to receipts, Brazil, Canada, Denmark, Hungary, Japan, Poland, Switzerland, Sweden, the United States and the Czech Republic as small markets with smaller contributions to receipts, and Belgium, France, Austria, Russia and Italy as medium markets with smaller contributions to the receipts; these are identified as development markets (Roland, 2009).

This document recommend the implementation of seven regional projects, namely:

- Accessibility development (by air);
- Resources qualification;
- Supply and services requalification;
- Events, entertainment and content;
- Human resources;
- Promotion;
- Convert the Entity Regional of Tourism into a DMO.

In terms of air accessibility and the U.K., strengthening the links with East Midlands, Bristol, Liverpool, Cardiff and Belfast was suggested. Regarding tourism products, it was stated that the Algarve must focus (promote) Sun and Sea, Golf, Residential Tourism and Integrated Resorts and MICE (called primary motivations) and develop cultural tourism, nature tourism, food, wine and wellness tourism (secondary motivations). Nature tourism and wellness tourism were considered possible primary motivations over extended time.

The plan recommends different approaches to the products, namely, in terms of supply infrastructure in the areas of nautical tourism (construction of marinas and nautical stations) and golf training (the creation of a golf academy), gastronomy and culture (routes dynamization and the creation of a hallmark event in the area of gastronomy) as a way to “enrich the tourist experience”, and see the growth of new products, namely MICE (using venues in emblematic places), wellness (the creation of a stamp of quality) and nature tourism. The continuation of golf promotion was also recommended.

Urban, environmental and landscaping quality was considered, namely in the area of requalification of touristic areas, the development of places of touristic interest, prizes for best practice and encouraging hospitality modernization. The role of the Regional Entity of Algarve Tourism in Algarve quality certification was defended. Events should be timed (namely during the low season, i.e. winter) and geographically distributed across the region.

Regarding promotion, promoting golf more was defended, nautical tourism and residential tourism promotion and identifying markets to develop these: Belgium, France, Austria, Russia and Italy. The use of personalities to promote the Algarve, improved press trips, educational trips and Internet presence were as well recommended.

4.4 United Kingdom Tourism Market in the Algarve

Along with the policy and tourism sector's organization evolution in Portugal and on a regional scale in the Algarve, the UK market's presence is a constant reality, particularly in the region analysed. The development of this market within the Algarve and the evolution of the region itself cannot be separated from each other, both are influenced by global technological, political and economic changes.

After the Second World War, the technology of air transport was in the ascendancy and the economic recovery of Western Europe was a reality during subsequent decades. Firstly, starting in the mid-1950s, it was the south of Spain that began the mass exploration and involvement with tourism, mainly supported by the package-tour boom in seaside Mediterranean resorts placed in destinations on the Costa del Sol or Costa Brava, which developed accessible holidays with a Mediterranean lifestyle for middle-class British families (Brito, 2009), a facility that until then was only available to the economic upper-classes in other foreign resorts, e.g. along the French Riviera. Curiously, references to the Costa del Sol and Costa Brava are still included today in the framework of possible alternative destinations to the Algarve, as the research's empirical work will demonstrate in Section 6.6.2.

With legal reforms such as paid holidays and technological revolutions making more free time available to workers, mass tourism gained strong support (Korstanje, 2007). The Algarve was the next step. Only 250 miles west from Gibraltar and its airport, it is still possible nowadays to speak with some older travel agents who recount authentic adventures of picking up passengers in Gibraltar by car and then travelling to the Algarve in the first years of the 1960s. This soon became only a memory, with the inauguration of Faro International Airport in July 1965 and the first direct flights to Lisbon, and soon direct flights to London.

With the quality of the Algarve beaches, the natural light and the mild climate throughout the year, the Algarve soon became a reference point for tourism operators. Demand started to rise consistently after Portuguese democracy began in 1974, with a boom in the mid-1980s and early 1990s, and Portugal's accession to the European Union in 1986, which progressively opened up the borders and delivered financial support to public infrastructures, such as roads and water plants, as well as private investment. The presence of British tourists become a regular fact of life in peak/off-peak, some of them choosing the Algarve to buy a second home for their annual holidays or retirement plans, a reality that still exists today.

Not only were the routes to the UK a key instrument in the development of Algarve tourism, natural sun and sea and other products also emerged. For instance, the first Algarve golf course dates from 1966, Penina in west Algarve, a golf course designed by Sir Henry Cotton; and the first marina in the Algarve was inaugurated eight years later, Marina de Vilamoura, which became a permanent reference in the nautical and residential market.

Historically, it is not possible to separate this Algarve tourism evolution from the United Kingdom market's influence. In fact, since the early years of the Algarve specialization in the tourism sector, which dates from the late 1960s, the United Kingdom emerged as the leading foreign market.

TABLE 4.5 – UNITED KINGDOM OVERNIGHT STAYS IN THE ALGARVE, 1970–2013

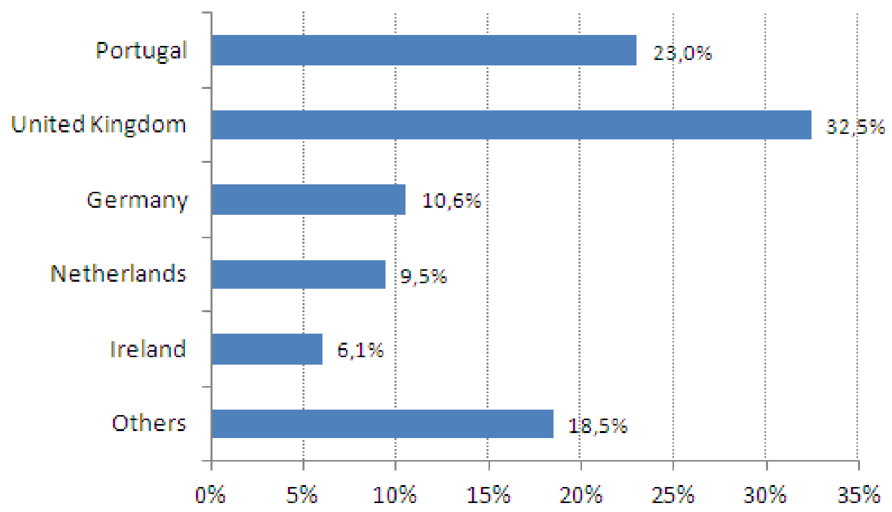
Years	United Kingdom Overnights (nº)	United Kingdom % of Total	Algarve Total Overnights (nº)
1970	481,063	34.8%	1,383,567
1980	1,436,088	27.2%	5,271,651
1990	3,593,102	37.2%	9,662,851
2000	4,967,804	34.7%	14,431,795
2010	3,700,951	28.9%	13,247,450
2013	4,855,633	32.5%	14,961,282

Source: Statistics Portugal (2014)

Despite some value fluctuations in which the pound sterling-euro exchange rate plays an important role (Andraz et al., 2009), as well as global economic crises, there is no doubt that the UK is the most important foreign tourist market in the Algarve.

Moreover the UK is first in the overall market, superior to the domestic Portuguese market, achieving in 2013 a total of 4,855,633 overnights in the hospitality sector, which means 32.5% of total overnights. As presented in Figure 4.7, the domestic market in the same year achieved 23.0% of total overnights with 3,445,583 from residents of Portugal.

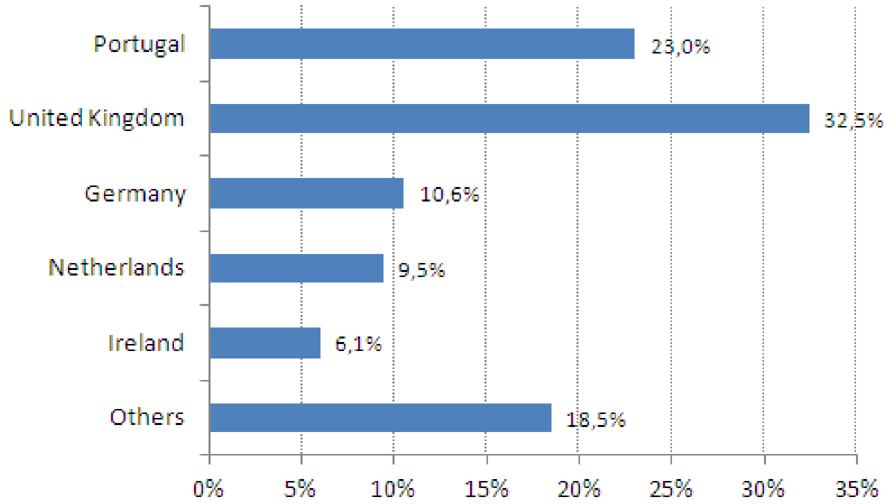
FIGURE 4.7 – PERCENTAGE OF OVERNIGHT STAYS IN ALGARVE LODGINGS BY COUNTRY OF RESIDENCE: 2013



Source: IMPACTUR (2014)

Together, these two markets, the United Kingdom and Portugal, account for more than half of the total overnight demand in the region. If considering only foreign markets, the UK represents 42.2% of total demand, which means that almost one in two foreign tourists in the Algarve come from the UK.

FIGURE 4.8 – PERCENTAGE OF OVERNIGHT STAYS IN ALGARVE LODGINGS BY COUNTRY OF RESIDENCE: 2013



Source: IMPACTUR (2014)

Centring the attention on foreign flows, this high level of specialization in one single external market promotes significant economies of scale and constitutes a potential benefit for tour operators. However, it is also a huge risk, because if this market collapses the impact on the destination economy will be enormous. Variables such as the currency exchange rate between the British pound and the euro play a crucial role in prices formulation, and suddenly a destination can become expensive without anything changing in the territory or infrastructures, as happened in the Algarve from 2008 to 2011 during the appreciation of the euro against the British pound. This is why price and the concept of value for money are variables that are included in stakeholder interviews and pointed by a large number of UK tourist respondents in the thesis questionnaire.

By analysing overnight stays' evolution in detail over the last 10 years, from 2003 to 2013, as expressed in Table 4.5, it is possible to compare the progress of UK market demand in the Algarve with global demand evolution.

TABLE 4.6 – UNITED KINGDOM VS. ALL MARKETS' DEMAND EVOLUTION IN THE ALGARVE: 2003–2013

Year	United Kingdom			All Algarve Market		
	Overnight Stays	Average Lenght of Stay	Number of Guests	Overnight Stays	Average Lenght of Stay	Number of Guests
2003	5,105,892	6.99	730,840	14,294,303	5.79	2,468,256
2004	4,696,490	6.68	703,307	13,252,873	5.43	2,438,736
2005	5,051,855	6.47	781,406	13,814,274	5.25	2,629,836
2006	5,047,026	6.21	813,174	14,163,652	5.11	2,770,658
2007	5,398,998	6.16	876,817	14,704,384	5.28	2,783,275
2008	4,748,600	5.83	813,900	14,265,164	4.87	2,927,819
2009	3,824,516	5.79	660,938	12,927,603	4.72	2,739,440
2010	3,700,951	5.50	672,601	13,247,450	4.61	2,874,136
2011	4,238,450	5.55	763,408	13,979,866	4.65	3,008,494
2012	4,537,976	5.43	835,063	14,326,774	4.71	3,043,920
2013[a]	4,855,633	5.45	891,248	14,961,282	4.71	3,174,609
2013/2003 Absolute Var.	-4.9%	-----	21.9%	4.7%	-----	28.6%
2013/2003 % Var.	-250,259	-1.54	160,408	666,979	-1.08	706,353

[a] Provisional data.

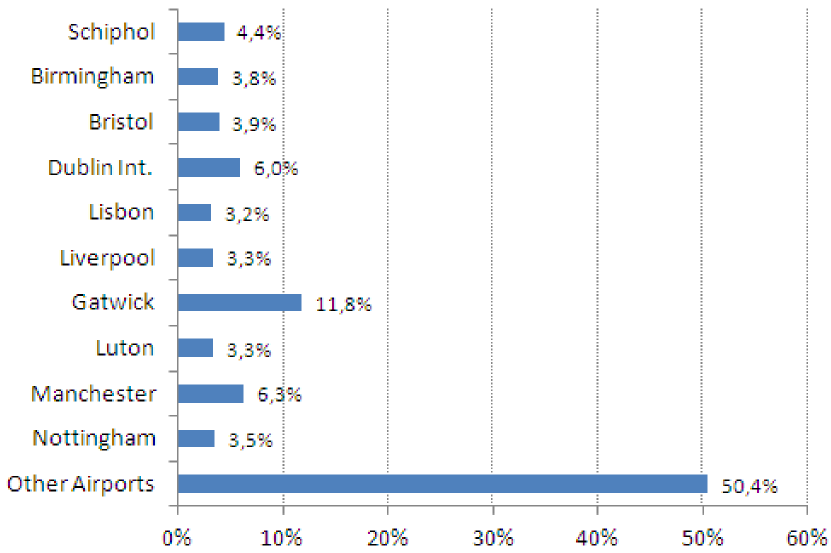
Sources: Statistics Portugal (2014) and IMPACTUR (2014)

Over the last decade, the UK market reveals a dual behaviour when compared to general tourism demand trends in the Algarve. The number of guests has increased and, simultaneously, the average length of stay has declined, which means more holidays periods during the year but each one reduced in length. This is a global tendency of international tourism behaviour, to which the Algarve and the UK market are no exceptions. The number of trips per year by interviewed UK tourists that travel to the Algarve will be one of the figures analysed in Section 6.2.1.

Concurrently, in terms of the number of overnights stays, until 2013 the UK market in the Algarve had not totally recovered (provisional data) to the level registered before the spread of the global economic crisis in 2008, similarly the euro currency's appreciation affecting the exchange rate. It has been recovering since 2011, but total overnight stays has still not reached the 2007 level. In the total overnight figure for the Algarve, this reduction was mainly compensated for by domestic demand growth and by the proximity of markets such as Spain, and the record figures of 2007 are expected to be exceeded for the first time in 2013. Despite these fluctuations, the UK is still the principal market for the Algarve.

Another reference for the unequivocal presence of UK tourists in the Algarve region is incoming passenger numbers according to airport/city of origin flying to Faro International Airport.

FIGURE 4.9 – FARO AIRPORT INCOMING PASSENGERS ACCORDING TO AIRPORT/CITY OF ORIGIN IN 2012

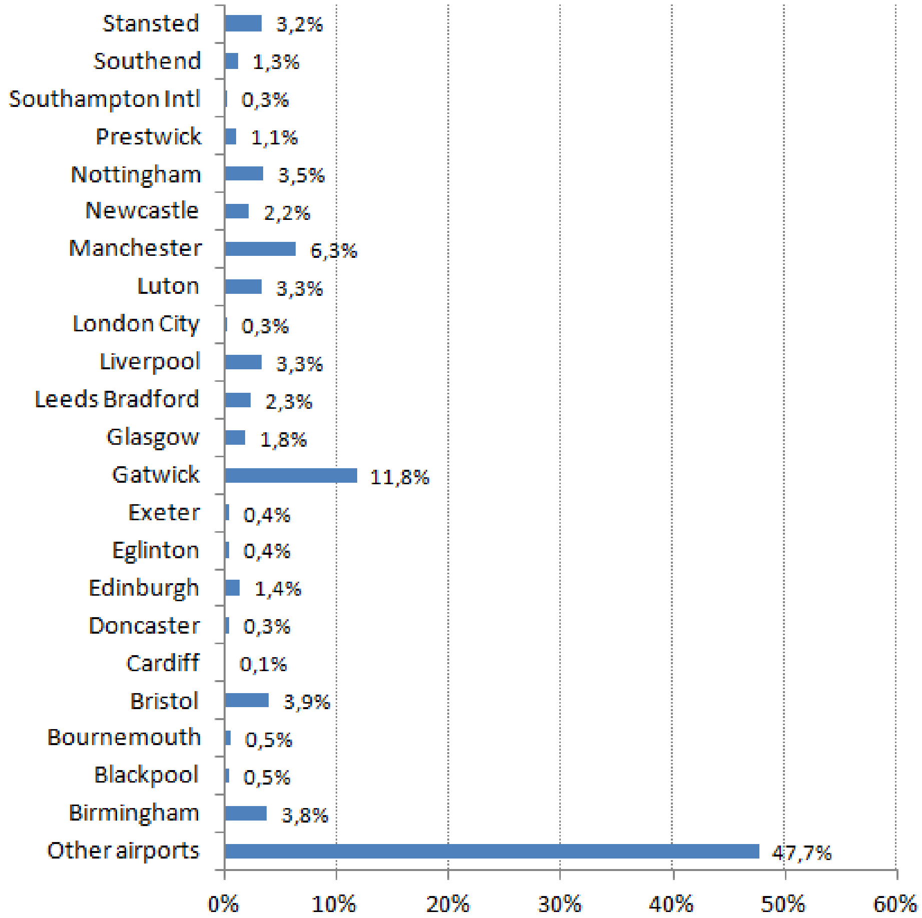


Source: IMPACTUR (2014)

As shown in Figure 4.9, seven UK airports are in the ten most important ones according to incoming passengers numbers at Faro Airport, with Gatwick in the leader, a reference influenced by the direct regular flights offered mainly by three low-cost airline companies, Easyjet, Monarch and Norwegian.com, as well as British Airways.

Analysing all the UK airports in the total airports, as shown in Figure 4.10, it is possible to conclude that there are 22 UK airports regularly connected to Faro International Airport, a number not matched by any other origin. These figures explicitly express the importance of the UK market for the Algarve, in which Exeter consist a first approach of a case study. There are another five UK airports not included in Figure 4.10 due to their residual figures, mainly from private jets, respectively Gibraltar (21 passengers), Isle of Man (15 passengers), Guersey (14 passengers), Manston (14 passengers) and Dyce (12 passengers).

FIGURE 4.10 – FARO AIRPORT INCOMING PASSENGERS ACCORDING TO UK AIRPORT/CITY OF ORIGIN IN 2012



Source: IMPACTUR (2014)

In conclusion, since the first years of Algarve tourism specialization, the United Kingdom market has been a constant structural presence in the region's tourism framework. Its dimensions even exceed those of the domestic market, with UK tourists being a common image in the Algarve day-to-day living and business activities, whether directly linked or not to the tourism sector.

Being evident as a market leader, this specialization in UK tourism ensures important economies of scale, but at the same time means a high level of dependence for the Algarve tourism economy and social environment. As a result, correct management and planning for the UK market – in which image role is emphasized during the present research – is crucial to destination development and competiveness.

4.5 CONCLUSION

This chapter has focused on Portugal and the Algarve tourism's public and private organization, a framework in which market developments and particularly the development of the UK market in the Algarve are shown to be a constant presence.

Portugal started to include tourism in its economic structure at the beginning of the twentieth century. The structural organization of tourism was initiated by the private sector, namely the Propaganda Society of Portugal, which understood the importance of tourism promotion as a key to tourism development. In 1911, the first steps were taken by the public sector regarding tourism administration.

However, due to tourism's cultural extent, it went through a confusing period during the Portuguese dictatorship of 41 years (1933–1974). It was a period of the generation of ideas and the beginning of image projection, but at the same time a period of misleading images. Although tourism was considered important in economic terms, the management of demand, and the country's preparation to satisfy this demand, presented a problematic management situation. In these circumstances, tourism policy and organisations suffered several changes, and somehow became an instrument of propaganda for régime policies when tourism was integrated into the Ministry of the Interior and the National Secretary of Information, Popular Culture and Tourism. After the democratic revolution in 1974, the Third Republic of Portugal began, and tourism achieved a political structure that still exists in Portugal, with its own Secretary of State.

The structures that fall under the responsibility of the Secretary of State for Tourism, the ones who run the policy, have endured different renovations. In 2005, in the context of modernization of the public administration, we assisted in the concentration of powers and administrative skills in a main structure called the Portuguese Tourism Board. This organisation absorbed the competencies of different institutions that work in the field of tourism.

Regarding the Algarve, as stated by Neves (2005: 180) at the beginning of the 1970s, the Algarve's tourism organisation was "one rudimentary administrative organisation without periphery services, skills or financial means ... The demand pressure, the lack of infrastructures, animation and promotion, give to the Algarve Tourism Regional Commission, in the absence of other public services, increased responsibility". The Algarve gained a role in the tourism field with the creation of the Algarve Tourism Regional Commission in 1970, an institution that at the time had to deal with competencies that exceeded its embryo stage. The development of tourism in this region was an opportunity for the development of new forms of organization.

In fact, regarding foreign promotion, a new milestone appeared in 2003 with the creation of the Algarve Tourism Association, the first step in the funding of tourism promotion by private and regional entities. This organisation, besides its lack of regional autonomy, was the first step towards financial regional participation. The former Algarve Tourism Commission, later called the Algarve Tourism Region and nowadays the Regional Algarve Entity of Tourism (Algarve Tourism Board), preserved domestic promotion and territorial qualification and valorisation, along with other competencies.

A milestone in recent years was the National Strategic Plan for Tourism produced in 2006, which is nowadays a fundamental tool from a strategic point of view. This plan gives an overview direction along strategic lines in terms of markets to invest in, tourism qualification, distribution and knowledge. It adds a pragmatic direction in terms of projects to execute the strategy. Three years later, in 2009, the Algarve presented an "alignment" with the national plan where it presented markets to invest in, products to invest in (core and secondary) plus requalification and activities to develop.

In terms of policy, the monitoring and success of these actions and strategy remain uncertain, since research identifies that there is no system that controls and monitors the success of these strategies and actions. Knowing that these plans and actions affect markets and being effects not monitored, the necessity to know the characteristics of the UK as the main overall market for the region is once more emphasised, particularly in the area of destination image changes as a central domain of destination competitiveness. As a possible future development in regional tourism decision policymaking, perhaps this image area will/should be included in a regular monitoring system.

CHAPTER 5 – STAKEHOLDERS INTERVIEWS

5.1 INTRODUCTION

The increase in destination competitiveness requires effectiveness in management, which will only be achieved with a clear knowledge of a destination's strengths and weaknesses. This form of management should develop coherent strategies combining perspectives of the different users of the destinations, namely, residents, tourists, workers, investors and other stakeholders. It develops a multiple perspective that represents a key issue in the theory of marketing places.

In this context the research presented in this chapter incorporates the views of the tourists and tourism stakeholders, in order to make a contribution to the destination branding and competitiveness. It also considers that stakeholders play an important role in destination branding as they contribute to the image building process. In view of the small number of stakeholders that have direct responsibilities in the Algarve tourism industry, the semi-structured interview is considered the best method from which to acquire a deeper understanding of the Algarve. The main issues to be investigated include the desired competitiveness and well-informed branding strategies. The methodology regarding the semi-structured interview follows the examples of other research in this field, particularly Bornhorst et al. (2010: 582) who stated "This qualitative approach allowed the researchers to probe the topic of interest on an in-depth basis. The questions permitted respondents to convey thoughts about the concepts and constructs, with few limitations". Elbe et al. (2009) reinforce the important role of the stakeholders and specifically of the DMOs in terms of the responsibility they have in promoting and attracting visitors to the destination.

Finally, considering the fragmented nature of tourism and the limited resources available, the integration of the different views of the key players in destination management is a crucial step in achieving the desired competitiveness and integrated branding strategies. Elbe et al. (2009: 294) argue that "Integrative destination marketing is not a result of distinctly rational planning. The process is non-deterministic, and it cannot be fully controlled. But it can certainly be influenced".

To validate and understand the specific regional factors and macro environment that influence destination image, five semi-structured interviews were developed with the main stakeholders that have competencies in the Algarve's tourism destination planning, promotion and transport network. The entities interviewed were: the Algarve's Tourism Delegation to the Portuguese Tourism Board in the UK, Faro International Airport, the Algarve Tourism Association, the Regional Development and Coordinating Commission of the Algarve and, finally, the Algarve Hotels Association. The interviews were developed during the months of May, June and July 2011.

According to the findings obtained, the interview process fulfilled objective 7 stated in the Introduction, regarding suggesting measures to enhance destination branding strategy in two seasons according to the findings obtained, and objective 3 to compare the profile and image of four different target markets of visitors: pre/post-visit and peak/off-peak seasons.

In order to facilitate the discussion/reading of this chapter, the researcher has opted to coding the five stakeholders as presented in Table 5.1.

TABLE 5.1 – STAKEHOLDER INTERVIEW CODES

Institution	Code Name
Algarve's Tourism Delegation to the Portuguese Tourism Board in the UK	A
Faro International Airport	B
Algarve Tourism Association	C
Regional Development and Coordinating Commission of the Algarve	D
Algarve Hotels Association	E

Source: Author.

The research analyses the main suggestions of the five representative organizations interviewed through stakeholders' semi-structured interviews. The text summarizes the core contributions to a total of eight topics, followed by, for each topic, a discussion in which we present the main quotations extracted from the interviews that support the core contributions to the discussion analysis. The eight topics, sequentially presented in Section 5.2, are:

- Tourism Destination Management Issues, which contain the structures of different Algarve tourism linked organizations, different bodies, partnerships regarding tourism, policy and destination management, and financing aspects regarding policy and others.

- Algarve Destination's Commercialization and Negotiation, which develops questions like the processes of negotiation and commercialization of the Algarve as a destination and the role of different institutions in these processes, management of the resources and channels of communications that best fit with the Algarve were also discussed.

- Algarve's Economic Development, mainly the economic aspects of tourism and products of the Algarve that could be developed by tourism, Algarve prices, and accessibility/transport and infrastructure.

- Competitiveness Aspects, a topic in which the main issues analysed are connected with the Algarve's competitors, its positioning and differentiation of the Algarve as a destination.

- Consumer Behaviour and Segments of the Algarve as a Destination were another theme discussed, an area that holds useful information regarding the Algarve's consumers' behaviour, which is extremely important in terms of research into potential new markets.

- Destination Image making, a key topic that includes discussion of questions about the Algarve as a Destination's promotion and destination branding, awareness of the Algarve and destination image.

- Another topic summarises the specific situation and behaviour of the UK market in the Algarve.

- The issues of semi-structured interviews ends with a topic that aggregates issues regarding events and animation, low-cost airlines and Tourism High and Low Season, a topic that has seasonality as a common concern.

These eight topics, as presented in Table 5.2, are organized according to the interview script and developed, taking into consideration, to a greater or lesser degree, the entity interviewed.

TABLE 5.2 – ITEMS OBTAINED FROM THE INTERVIEWS

	Branding Strategy Items Obtained from the Interviews
1	Tourism Destination Management Issues
2	Algarve as a Destination's Commercialization and Negotiation
3	Algarve's Economic Development
4	Competitiveness Aspects
5	Consumer Behaviour and Segments of the Algarve as a Destination
6	Destination Image making
7	UK Market in the Algarve
8	Events/Animation, Low-cost Airlines, Tourism Peak and Off-Peak Seasons

Source: Author.

5.2 INTERVIEW ANALYSIS

The next subsections present interview discussions organized by item. To organize these items it was necessary to analyse all the interviews and code similar issues in the same subsection. In some subsections the presence of some institutions (interviewed) is stronger due to the position and competencies of that institution (represented by the interviewee) in relation to the theme identified. Because the different stakeholders interviewed represent different competencies and cover all the tourism entities in the Algarve, it is expected that the discussion could help to expand the knowledge about the Algarve as a tourism destination's main strengths and weakness regarding inputs to a future destination branding strategy. These inputs are extremely important to one of the main objectives of the thesis, namely to propose measures to enhance destination branding strategy in the two main seasons according to the findings obtained, namely objectives 3 and 7 indicated in the Introduction.

5.2.1 Tourism Destination Management Issues

The first topic of the interviews concerned Tourism Destination Management Issues. This topic covers the structure of the different bodies, the partnerships in the Algarve as a tourism destination, policy and the Algarve's destination management and, finally, the financial aspects of the Algarve tourism industry. Several comments and conclusions might be summarized as core contributions for the research.

Regarding the **Algarve's tourism bodies,** one of the questions was about the Algarve's foreign representation. Mr. A stated that "*This organism (the Portuguese Tourism Board in London) results from the fusion of four distinct entities: one that clearly had powers concerning touristic promotion, and based on the former Agency for Investment and Foreign Trade of Portugal (AIFTP);*[25] *a second entity, the General Tourism Delegation,*[26] *that had more incisive expertise regarding the planning of touristic supply; a third one more related to the training of touristic assets, and by assets I mean the human-resources component; and a fourth entity that has to do with gambling, General Gaming Inspection. From the aggregation of these four entities the Portuguese Tourism Board (PTB)*[27] *was born".* Portuguese tourism structures have undergone a general restructuration which had as its main objective to slim down the existing tourism structures. This process took some time and involved four tourism structures. The fusion represents some cuts to infrastructure and the labour force and was integrated in a global process of fusion of different public structures. The Portuguese Tourism Board abroad is integrated into an entity that defends the economic interests of

[25] In Portuguese *AICEP: Agência para o Investimento e Comércio Externo de Portugal.*

[26] In Portuguese *DGT: Direcção-Geral de Turismo.*

[27] In Portuguese *Turismo de Portugal.*

Portugal abroad (an investment agency) and is paid by the Portuguese Tourism Board, though this structure does not have a specific budget to develop its main activities in the UK market. It organizes contacts and logistics. Its main competencies are related to establishing the correct links with different stakeholders that work in the UK market. This is an institution with competencies regarding the UK market (the main market for the Algarve as a destination) for all Portuguese territory, not only the Algarve.

Mr. A submits in evidence the lack of autonomy of this delegation (the Portuguese Tourism Board Abroad). He remembered the Houses of Portugal, the first Portuguese tourism delegations abroad. In this context, he stated that "*Those delegations (the delegations of tourism abroad) started as the Houses of Portugal, going back to Fascism (…). The Houses of Portugal functioned separately from the embassies and delegations for Portuguese external commerce. They had proper autonomy, achieving brand positioning in the countries where they settled*".

Regarding the Algarve as a destination, the entity responsible for promotion abroad is the Algarve Tourism Association, which was created in 2003 and based on a new organizational model to strengthen external promotion. This structure has skills regarding Portuguese tourism's promotion abroad and results from a partnership between the Portuguese Tourism Confederation (PTC), which is an organization in the private sector, the Association of National Tourism Regions, which is a public association for the management of national tourism, and, finally, the Portuguese Tourism Board. Mr. C stated that, "*and so the three entities, the Portuguese Tourism Board (PTB), the Portuguese Tourism Confederation (PTC) and the Touristic Regions National Association (TRNA), decided to create a model for external promotion. We are 13 (the number of people working in ATA) including me. I mean, the structure has 13 people, but then there are the product managers, those are the ones directly linked to promotion. I have four senior managers, two junior managers and then I have two people in administration, two in marketing and two in accounting".* So the regional tourism entities of tourism underwent a process of restructuration linked to the funding cuts to public bodies.

In this process, the Algarve Tourism Association seemed to face the difficulty of a lack of human resources.

One question that emerges from the discussion was the destination's lack of management skills and the fact of having structures with shared powers of management and which required autonomy. So this process of restructuring could help to improve this problem of shared powers. A good example given was that the Portuguese Tourism Board aboard works in partnership with the airport, private destination entities and the Algarve Tourism Association.

In relation to **partnerships**, the theme was of strong interest to the five respondents, who gave special input regarding human resources and synergies with other economic activities. The main answers highlighted concentrated on the good partnership between the Portuguese Tourism Board abroad and the airport in order to develop new routes to the Algarve. During the conversation it was concluded that the airport by itself does not attract people to a destination. It operates as a required part of the infrastructure. Its main facility in terms of a tourism partnership is knowledge of the consumers and the context of data management (business to consumer). In particular, the airport possesses important information regarding consumer preferences, data-mining and routes with potential development.

In the business-to-business context, the process of negotiation between the airline companies is based on partnerships. The airport has to manage and monitor the interests of the airline companies and the destination. The airline company may have occupancy which means more tourists, but in the end the profitability is low. So it was stated that, *"…we manage to monitor, if we wish on a daily basis, the behaviour of a certain operation for every single destination, the stream of passengers that come through a certain route, on a certain airline and from a certain airport of origin. So during the dialogues that we maintain with these airlines and operators, we make them see that we are up to speed with this information, mainly values in terms of passenger streams, but that's just a fraction of the issue. For example, a company can fly to 100% of its capacity. We can be very satisfied with it, especially in the Algarve's case where the majority of* *passengers are tourists. That is great. However, if the airline is losing money with a pricing strategy to guarantee maximum occupation rates, which is a situation that should certainly concern us. We must have a balance between good levels of occupancy and the profitability of the route itself. Otherwise, at the end of the year, the airline makes a route assessment and realizes that the route has had good performance occupancy-wise but with a deficit in profitability, leading it to try its chances elsewhere".*

One question that the entities emphasized was synergies with other economic activities, namely gastronomy and wines, although when asked to mention synergies, they did not mention any relevant activities undertaken with other economic stakeholders in the region. The Algarve Tourism Association, which is responsible for the Algarve's promotion abroad, works in partnership with the Portuguese Tourism Board delegation abroad, aiming to organize events and educational trips, an area where synergies may be developed.

Regarding territory administration, it was stated that this institution works in partnership with public and private tourism entities to design plans for the territory. Yes, they are partners (entities that administer the territory), although it was stated by the promotion entities that, "*We participate in meetings when there is the National Strategic Reference Framework (NSRF)* [28] *and such. Our intervention is not related to opinion issuing, nor regarding qualification (…). We are simply partners".* So tourism entities (regional promotion entities) are asked to give opinions and participate in plans formulation, although they are not asked to license tourism activities.

Another relevant input to this theme could be called **Policy and Destination Management** (in general), a theme in which several criticisms were expressed by each organization, namely regarding the lack of tourism policy. Now though, Portugal has a strategic plan for a relatively long period of time, the so-called National Strategic Tourism Plan[29] is a plan for 10 years that began in 2006. One question that was highlighted was the importance of having industry

[28] In Portuguese *QREN: Quadro de Referência Estratégico Nacional.*

[29] In Portuguese*: Plano Estratégico Nacional de Turismo*.

professionals in tourism, public or private, and not “external” people from the political parties.

Regarding historical tourism policy, it was stated that the first approximation to a tourism policy was the “Dodi Plan” in Salazar’s period (the period when Portugal lived under a dictatorship: 1933–1974). This historical contextualization was helpful to understand “why” the lack of policy. This first plan was developed in order to develop the Algarve as a destination in terms of economic and infrastructural development. The problem of a lack of policy was referred to as a problem of lack of financial support, a supposed policy. There seems to be a block between public and private institutions. The private sector representatives consider that partnerships are good but not with the public sector in control. They consider that promotion is a responsibility of the public sector. It was clearly stated that: *“Partnership is good, but not if it relies in the government to regulate it. The problem is that the government wants the private sector to bring in money in addition to the taxes it pays. At first sight, promotion is a matter for the government because it is the principal beneficiary of touristic activities”.*

The opinion of various stakeholders is that a solid policy will only be possible with instruments and a proactive policy. The public planning sector states that the lack of a land-use policy and use of capital means that everything stays in the public sector. Regarding these questions, it was highlighted that, *“We don’t have a soil policy. We don’t have a plan for the appropriation of capital gains by the public entities. Therefore, everything stays in the private sector. Nothing is done in order to restore agricultural property. There are no limits to land division as they have, for example, in Germany. Our mediocrity is such that we never make decisions about anything. There are always exceptions and so, evidently, we never get out of this hole”.*

Specifically regarding plans and more specifically the Algarve Marketing Plan, it was stated that the Algarve needs adjustments according to market dynamics. The importance of investment in research was highlighted and understanding why some tourists do not choose the Algarve as a destination.

Finally, regarding **Financial Aspects**, with several topics expressed by the organizations' respondents, there is a common link between their opinions: the lack of capital and the focus on Algarve's low level of promotion when compared with the Andalusia region (Spain), in their opinion the Algarve's main competitor. Andalusia has a larger population than the Algarve, although the Algarve proportionally makes a greater touristic contribution to the country. In the opinion of the promotional entity of tourism, promotion value should be 3% to 5% of tradable goods.

The model of funding created to finance promotion entities is based on a public-private partnership, in which, for every two euros that the regions invest, the Portuguese Tourism Board (at national level) invests more four euros, although again it seems that the private sector does not trust the politicians to manage their money. "*What happened is that when we proposed promotion partnerships, they weren't only for money to be given by the private sector, we agreed to invest our money but also to be entrepreneurs within the promotion as well, due to our proximity (in the hospitality sector) and connections with the market, because the politicians aren't trusted by the markets".*

In summary, five main issues emerged from the interview process, respectively, tourism bodies' restructuring, the lack of management skills, the airport's role, potential synergies with other economic activities and, finally, a universal criticism about the lack of any public tourism policy.

The first concern highlights the context of Tourism Destination Management Issues and is connected with the restructuring of tourism entities. Nowadays, the structural organization tends to be concentrated in a single entity that has most of the powers focused within it. This restructuring was carried out with the main objective of reducing the costs of operation. In this process of cutting costs, regional tourism promotion seems to have suffered from a lack of human resources. The destination's lack of management skills emerged from the discussion. This is a preoccupation which might became even more stressful if the restructuring leads to an improvement in/displacement of the highest management skills and decision-makers to outside the Algarve region. Thirdly, in terms of partnerships to improve destination research, it seems that Faro International Airport's input is extremely important to business-to-business and business-to-consumer data management, namely by making important contributions in terms of knowledge of consumer preferences, data-mining and potential new routes.

The next issue emphasises the role of tourism as an open sector. It seems that the synergies with other economic activities could be improved. Although the public-territory administration and development (land-use administration) work in partnership with regional tourism entities, these entities do not have powers in terms of tourism qualification and licensing, which is considered a restriction on the organization of the destination.

Finally, in terms of political issues, the stakeholders point to the lack of policy and the importance of having dedicated career-minded professionals in tourism and not people "travelling" from the political parties. The lack of policy was referred to as a lack of financial support and lack of instruments to support it.

5.2.2 Algarve as a Destination's Commercialization and Negotiation

The second theme relates to Destination Commercialization and Negotiation, from which discussion emerge contributions to the research analysis. On this topic, the discussion goes through the question of the delegation of the Portuguese tourism board in the UK that acts like a mediator between the different players in the tourism sector in order to promote the Algarve region. This institution explores new routes and markets and promotes partnerships between different players. It also participates in fairs to promote these partnerships. As an example, Mr. A stated: *"Yes, for example there are the main international fairs such as the WTM – World Travel Market, FITUR or ITB. These are events where we have our own stand and where we also receive many visits from our partners. Normally, we try to pre-organize meetings with the representatives of airlines at these fairs or even from other destinations that simply go to the fair in order to discuss specific issues with our destination".*

Regarding the **Process of Negotiation** of new routes to the Algarve, Mr. A highlighted, *"These three partners identify the places that have some potential in terms of traffic and the Algarve destination. Therefore, they use tools developed by ANA airports to measure the potential of a certain route. So, we (the Portuguese Tourism Delegation abroad) prepare case studies about those routes where we identify possible partners to initiate those operations. To do so, we engage in direct contact with partners, usually through specific events like World Route Development, which is an event with the airline companies and the airport segment where we usually chaperons the airport and present those case studies. At these events, the airlines sit down at a table and the airports take turns of 20 minutes. This allows them to present the opportunity for a new route".*

Regarding the Algarve Tourism Association, this institution works with different agencies of communication to promote the Algarve, and with tour operators, travel agencies and journalists. When necessary, they organise specific campaigns. They form partnerships with tour operators and airlines for hard-selling. Specifically regarding air transportation, Faro International Airport develops specific tools to explore new routes and markets. Mister B stated that: "*With the operators, the tendency has been towards disinvestment in terms of provision capacity. This has been an unsteady subject. A lot is due to the low-cost companies' interventions that have created not only a substitution effect, but also an increase in capacity. I'll give you an example. About a year ago there was a big fuss about decreasing the capacity of the major operators during the winter period. If we take into consideration that Ryanair took a bet on a base in the Algarve, if we keep in mind that there was also a significant increase during the winter for Easyjet, clearly those tour operators' decreases were unduly affected by these events. With this I wish to say that we have the necessary tools that can be put to use. The capacity is there. We need to use that capacity and present our product to stimulate consumer demand".* According to the stakeholders' perspective, the tendency has been to disinvest in negotiation with traditional operators and invest in the low-cost companies (with online bookings).

A second theme that emerges here is linked to the **Commercialization of the Algarve.** This is an area in which politicians, online channels and tour operators fulfil the core of the discussion. One of the marked conclusions of the discussion was connected with the question of politicians not being the most obvious people to manage distribution and commercial channels. To reinforce this idea, Mr. E stated that, *“The operators don’t want to speak to politicians, they don’t understand them, neither do the distribution and commercial channels of the various markets (…). Politicians aren’t exactly the most obvious persons to conduct business with private agents, there is total mistrust; on the other hand, what they do understand is if (…)”.*

Another question that emerges from the discussion is the resources that need to be managed to commercialize the destination. There was no consensus that it is important that the strategy concentrate resources on the main objectives. It was by Mr. C at this point that, “*Maybe concentrate (…) Listen, the issue of concentrating resources is a reality but sometimes it is better to optimize these resources instead. Sometimes concentration may have some problems because if that approach doesn’t work you’ve lost all your money. Today, more than ever, there is an awareness of the need to invest money better in promotion, and in areas where you can measure the profits. On that matter, I highlight the investment in online channels. For the last couple of years we have witnessed a tendency of adapting the means to the online slope. By this I don’t mean that we stop using offline facilities but with online channels there is a bigger chance of measuring the effects of investment”.* So the online channels are an important tool to understand/measure the return on investment and the need to create specialized Algarve Internet operators settled on using certain countries and the need to establish cooperation between tour operators and the destination (the right timings to promote the destination) and the importance of promoting/selling the Algarve as a premium product.

In conclusion, this topic was extremely important to knowledge about the key question regarding the Algarve’s commercialization and negotiation as a destination. The questions that arose from the discussion focused on different institutions’ competencies and activities regarding this issue. They referred to fairs, the promotion of partnerships and specifically the role of the airline companies in order to improve the Algarve as a destination’s commercialization.

The actors that should lead the processes of negotiation were discussed as well. There seems to be general agreement that politicians are not the obvious people to conduct this process. One question that emerged from the discussion was what resources should be applied to this process. The question of concentrating and better investing money was discussed, and regarding this point, the online channels seem to make an important contribution to the understanding of the return on investment due to the tools and market insights that they can provide.

5.2.3 Algarve Economic Development: products, Prices, Accessibility/Transport and Infrastructure

The third topic concerns a broader sense of the Economic Aspects of Tourism with extension to Products, Prices, Accessibility/Transport and Infrastructure. This is a subject already discussed in other domains, and the existence of only a few main references, consensual and hardly contradicted, comes as no surprise.

A common trend, that all the interviewees referred to and that is well known, concerns the economic development of the Algarve and the important contribution of the tourism industry to it. Before tourism, the Algarve used to be a poor region, its economic structure before the 1960s was mainly based on a subsistence economy. Tourism makes a contribution to the development of the Algarve regarding infrastructures. It was pointed out by Mr. D that, *"Tourism was the reason why Algarve ceased to be a poor region … we had a subsistence economy with islands of productivity associated with traditional things, some agriculture, fisher (…). We have a level of cleanliness in the urban centres that has nothing to do with a few years ago".*

The discussion extends to the **products of the Algarve as a destination**. In this area, a double perspective emerges, from one side the importance of sun and sea and golf, and simultaneously, the absolute need to introduce other products. Specifically about golf, competition and business strategy, Mr. E said: *"Not that I know of. How is the golf? We claim to have the best golf courses in the world, and it's true, and the high season for golf coincides with the low season for tourism (…). The world average rounds for golf courses is about 14,000. We have* *more than double, but even so to try to profit from golf courses is very hard. These have to be associated with something else. They have to be recognized as an integrated product, which we don't have".*

The promotion entities are trying to introduce other products to the Algarve's, such as nature tourism, and residential tourism makes sense in the Algarve, although it is important to bear in mind what to do with seasonal homes during non-occupancy periods. The importance of the nautical product as a complement to other products and industries was referred to. The Portuguese Tourism board still has a strong investment in the sun and sea product. For the regional entities we still should invest in other products. However, speaking in regional terms, it seems that the sub-regional entities segregate the product, trying to develop different products without a clear and global regional strategy, as stated by Mr. C: *"And on top of that we segregate the product. Barlavento promotes the Arade River. Albufeira does something else. We already suffer from micro-management on a European scale and we further segregate".*

Regarding the markets, it was stated that the UK market has a strong impact on Algarve tourism's economic structure due the vast knowledge that the British have about visiting the Algarve.

Another theme that emerges from this topic discussion is the **Algarve's prices**. It produced succinct comments, since this theme was discussed in other areas of the interviews, namely segments and products. It was commonly accepted that today the price factor is very important due to economic constraints, and it seems that it is important that the Algarve does not compete with some destinations with unbeatable prices, namely Spain which is more competitive than Portugal in terms of prices due to more favourable taxes and market scale. Specifically regarding the Algarve's offer, it was stated that the hotels should invest (renew and remodel) in order to justify higher prices.

A further sub-topic focused on territory, specifically the subject of **accessibility/transport and infrastructure**. The main criticisms focused on insufficient planning and the need to assume quality as part of routine management and not by way of lump-sum investment. The development entities are concerned with creating structural conditions for tourism. Specifically regarding the question of accessibility, this is considered to be good, although the Algarve should invest more in railway connections, mainly in connections to Lisbon. The Algarve's roads are reasonable. The problem is the National Road 125 and the (bad) image associated with it. It is important to improve road maintenance and the so-called "quality routines", and the road signs and security on the roads are a weakness of the country too. At this point it was stated by Mr. D that, *"This is our problem. There is something called quality routines. You go to the marina and there is always a pile of garbage, always! It doesn't take much to realize that every couple of days there needs to be a guy picking that up. But that applies to everything. How many times do I need to stand here and shout in order to get things done?"*

It was pointed out that with the increase of the cost of footprint, the Algarve will start to have strong limitations on destination development based on low fares, with the airport being a necessary condition, but it is not in itself sufficient.

The lack of planning emerges from the discussion and one question that was asked concerned whether it is important to have more coordination and development of the territory, and the question of the water supply. It was stated by Mr. D that, "*We lack serious planning. The regional plan for development looks like a Maginot Line. We have the idea that territory defends itself by hiding and waiting for the enemy to arrive"* and *"We need more quality in the coordination and development of territory or else we don't stand a chance. But we did make some big progress regarding the water supply. We did it by resorting to the supra-council scale, also concerning the access to the Via do Infante and the connection to Lisbon, which was absolutely decisive and couldn't be any other way. But there is still a lot to do in terms of environment qualification and regarding the quality of the patrimony within the cities".*

In conclusion, the tourism industry and economic development are strongly linked in the Algarve region. Algarve tourism's specialization level signifies that one cannot "live" without the other, a partnership where products, prices and territory administration skills and policies must be carefully designed from a long-term competitiveness perspective.

5.2.4 COMPETITIVENESS ASPECTS

The fourth subject focused on a discussion about the Algarve´s Competitiveness and started with the Algarve's competitors' identification. References to flight connections, prices and products were common, as well as to Andalusia and Malaga as the main competitors.

This theme evidences a strong consensus and consequently received much input from the respondents. All the Mediterranean countries, and especially Spain and the southern strip of the Mediterranean, are competing with the Algarve. Malaga seems to be considered as one of the Algarve's main competitors due to the airport infrastructure, namely: "*Regarding our competitors, I can't see a more immediate competitor than Andalusia. Andalusia always ends up being our point of reference, not only tourism-wise but also in terms of flight connections. We have to have a perception of what the level of connectivity is between Malaga and the UK, compared with Faro Airport. In addition, we need to understand how it has evolved in terms of touristic operations, with its origins in a number of markets, not only in the UK,"* as Mr. E stated.

The Andalusia region is an important competitor. Andalusia is one of our main competitors, although it is important to bear in mind that it is different in its geographical dimensions and in terms of population. At this point it was stated by Mr. E that: *"Andalusia is our best reference. Evidently, when we speak of numbers it is a completely different candidate, but in terms of behavioural tendencies it is important to make that comparison".* Spain has developed a model of tourism based on construction, residential tourism and low prices. Mr. E considers that the Algarve should not compete in that segment. The lack of productivity and the seasonality are a weakness of Portugal, and of the Algarve in particular. It is important to improve productivity in the competitive arena and the Algarve should not compete in segments where it is not a leader or strong, allowing the risk of failing to meet image expectations. It was noted that service in the Algarve is bad due to a lack of professionalism, and tourism not seen and worked on as an industry with enough marketing associated with it. The Algarve essentially competes on the price factor and to be more competitive it needs to decentralize decision-making powers. On this subject, Mr. D stated unambiguously: *"Nothing! We have a conception problem and we need to be more objective. But going back to what we were talking about – competitiveness – I am not specialist, as is clear, but I think we need to understand this: First, with the model of organization that we have here, with the power concentrated in city hall and in supra-regional entities, we are not going to get anywhere. We blow money on nonsense things".*

There seems to be agreement that the Algarve lacks of attractions other than "Sun and Beach", and even in the region that is not so strong. Mr, D illustrated this idea, stating that: "*I believe so. In the Algarve everyone talks about "Sun and Beach", but I think that people have a big problem. They don't travel much, not the operators, not the mayors, people just don't travel. Therefore, they spend their lives believing that we have unique stuff when in reality we don't. In terms of cultural patrimony, the Algarve is relatively weak. You could never compare it to Sicily, for example. It's an impossible comparison. You could compare it to some parts of Greece, but nevertheless they have the exoticism of the islands and a number of things that we don't have. On the other hand, it is easier to get here than to the Greek Islands. It is not a coincidence that we are considered the leading family destination, I believe that's our strength".* In a competitive context, it was stated that, *"We are going to face serious competitive problems based on various factors, the first being productivity. We are a seasonal region and we have very low productivity, more than half of our labour force doesn't even have a high-school diploma and two or three months of work isn't incentive enough to take a course, so qualified labour we don't have … The thing that differentiates us, the people, the human factor, which is fundamental and decisive, is disappearing".*

In terms of segments, the Algarve could be considered a leading family destination, and it is considered that, in the competition arena, it is important to have a price that offers value, the importance of an appealing price. In the context of the Algarve's competition analysis, it was stated by Mr. E that it is important to analyse flight connections, the touristic operations between markets, and the question of competing with destinations that bases offers on an all-inclusive price due to political and religious instability. These destinations compete with lower prices, and the resorts have *“unbeatable prices, the cheapest labour, favourable taxes; the land is offered by the government and they have tax incentives for the first five to ten years”* and *“Well, we have to position ourselves in other segments. The family segment was our core business, but the southern Mediterranean countries have cheaper labour and a series of less expensive factors, so when we try to do an all-inclusive resort here we don't have all the conditions… ”*. At this point it was mentioned that Turkey is one of the Algarve's main competitors, although it has a different offer based on all-inclusive resorts. In this context, security used to be one of the Algarve's main strengths, so the region has a competitive advantage in this segment.

An additional sub-theme that emerged from the discussion was the **positioning of the Algarve**, a theme where products, competition and promotion are the main preoccupations of the organizations interviewed. As regards destination positioning, it was discussed that this topic is important due to image construction. Destination positioning is important because the image that is being constructed might be exactly the same as for the destinations that the Algarve competes with. The importance of gastronomy in positioning strategy was also mentioned. The Algarve Marketing Plan suggests four umbrella markets for the positioning strategy and five complementary ones. As umbrella markets, the plan recommends Sun & Sea, Golf, MICE and Health & Wellness Tourism, and then as complements, Residential Tourism, Cultural Tourism, Senior, Nature and Sports. The Algarve Tourism Association adapts the Algarve's promotion to each market. It seems that one of the weaknesses of the Algarve's positioning is related to the fact that the Algarve is a mixture of a bit of everything, so the competition is considerable; it was stated by Mr. C that: *“We have a bit of everything, so we have a problem with competition. If you notice, some fabulous 4-star hotels in Quinta do Lago are offering 3-star prices (…) it's the market in action”.*

Following the previous topic, the next discussion is about the **differentiation of the Algarve as a destination**, a subject where the organizations reveal a somewhat pessimistic perspective, which compromises competitiveness efforts. The question of the Algarve has the typical image problems of small countries. It is difficult to construct a distinctive brand image. Mr. C argued that, *"Differentiating (…) we try to do so at a level of communication but there are elements that exist here that are very strong. The beaches are one of our strongest elements in terms of communication, but we also try to explore other skills, such as our exceptional golf courses and other products like wellness, gastronomy and wine. Even residential tourism. The latter is an extremely interesting aspect because most of the time the ones who make the decision to buy a second home here are certainly those who had a very good touristic experience of the destination. The fact that today we are passing on the image that it is good to live in the Algarve offers optimal conditions in terms of communication, of promotion".*

One of the aspects of concern discussed the importance of understanding why people do not choose the Algarve as a destination. It seems the Algarve does not have a differentiating product, although it is different from the Mediterranean destinations (namely, the Algarve coastal waters have tides). Comparing with the Algarve's main competitor, Spain, the common opinion was that Spain has a different climate, it is humid and sultry. It is too hot for northern markets and the British's do not valorise the beaches. For promotional entities, the Algarve's differentiating aspects are the beaches, the golf courses, wellness, gastronomy and wine, and residential tourism and the Algarve cannot compete on price with all-inclusive destinations.

In conclusion, the Algarve's competitiveness should be treated as a permanent ongoing process, on a map where traditional competitors, such as Spain/ Andalucía, and emerging ones, such as Turkey, clearly exist. For better differentiation, the Algarve should focus its strategy on its leading skills, and avoid being a bit of everything.

5.2.5 Consumer Behaviour and Segments of the Algarve as a Destination

In this theme, another topic that emerged from the discussion relates to consumer behaviour and segments of the Algarve. This is an area where innovation, renovation, study and the need to adapt business to the new economic realities were commonly expressed and deserve a clear commitment from the respondents. One question that emerged from this particular discussion was that it is important to have renovation besides repeat tourists. We might note the opinion of Mr. B: *"My logic was that we have a rate of repetition without renovation, meaning that we are consuming our clients without renewing them, and that in time dies out. We aren't able to innovate our product. It has been remained the same for who knows how long (…). The client that came here in the 90s is now 20 years older. Decisions change with time, revenues too, and I am convinced that this has not been taken into consideration. My opinion is that we are a bit amateur when the time comes to analyse these issues. We most look at this in a systematic way; otherwise we have a big problem on our hands".*

So, the Algarve must innovate and differentiate its product. In this process it is important to understand decision-making, to have a correct marketing strategy and to understand consumer satisfaction, capturing the tourist imaginary. It is central to study the consumer, besides political strategies, and to adapt the business to the new economic reality, namely online bookings and the lack of control of hotel management due to contractualisation. Mr. B stated, *"We need to study, draw a bit of the politics away, because this is a lot about industry and very little about politics" and "I think it's imperative that we realize something. The Algarve's hotel businessman has his own way of running his business. Back then tourism was much more seasonal. Not that seasonality has been overcome. Far from it. We still have a long way to go in order to fill that void. But anyway, these men's work was very much connected to the earlier contractualisation that they had with the tourist operators. In fact, they had a guarantee, in that those contracts were established and their lives were relatively easy. Today, with the business model that is established, that makes no sense; and also, with the access to new technologies, the tourist has become more and more independent, which makes it mandatory that the hotel manager work with other partners to try* *and compensate for the loss of business share that he had with the tour operators. The one who unfortunately doesn't adapt to this reality shall see his business seriously compromised".*

The second topic pays attention to **segments of the Algarve as a destination**, a discussion linked with a previous subject about products. It was relatively consensual that different markets need different promotional approaches, a discussion where high and low seasons should be taking into consideration, as well as the requalification of the Algarve.

It was noted that the segment of sport traineeships is important in winter. The golf segment is important but the Algarve need to control its prices in a competitive arena. The priority markets are the UK, Germany, Spain, Holland, Ireland and Scandinavia. It is important to invest in other segments besides families due the problem of seasonality. This will attract tourists outside the high season, given that, as stated by Mr. E *"Another thing is the importance of these profiles. These potential new visitors are important for the seasonality issue, as families are strongly correlated with the sun and sea product. However, the best in other products, and in other tourist profiles, will let us have people who come at other times of year, outside the high season".* A different market needs different promotional campaigns for the Algarve's attractions. A question that concerned one of the interviewees was the need to promote investment in the requalification of the Algarve supply, and in the opinion of the private sector, some tourists that arrive at Faro airport do not stay in the Algarve, they cross the border by car or hotel-transfer to Spain.

To sum up, all the entities interviewed showed a strong commitment to the need to study consumer behaviour, not as a short-term solution but in a permanent analysis and discussion forum. Tourism behaviour changes over time, the territories and the segments they intend to attract should keep up with this change.

5.2.6 DESTINATION IMAGE MAKING

On this topic, the discussion centred on the Algarve's destination image making. One issue of particular interest to this discussion was the **promotion of the Algarve as a destination**, an area of strong commitment and awareness among the representatives of four organizations. On this topic, the main questions that arose from the conversation were connected with the financing dimension and with the entities that should be selected to promote the Algarve as a destination. It seems that, indirectly, the Algarve Hospitality Association has been the promoter of the Algarve as a destination in terms of financing the tour operators that commercialize the Algarve. According to Mr. E, *"Indeed, indirectly we have been the promoters (Algarve Hospitality Association) because we have to pay what they spend on promoting the sale of the Algarve, for our brand affirmation. What they spend on publicity, promotion and diffusion, naturally they will subtract from our prices (the private hospitality sector of the Algarve). There have been some efforts to reach an understanding within certain quarters, some actions that consist of contributions that we give to some operators. Some hotels individually give operators a certain percentage of their sales for brochures and some other contributions, but as for a strategy with a beginning, middle and an end, there never was one".*

In this context, the opinion of Mr. C is that promotion should have a commercial perspective and be decentralized. *"Promotion must be decentralized, because touristic regionalization is a reality. Promoting the Algarve is not the same as promoting Lisbon. The Algarve must have an entity responsible for its promotion and sums must be allocated by the government to the different touristic regions depending on their weight in the context of the global offer".*

The financial support of new itineraries in the destination is an important tool for destination commercialization, although there is a lack of financing to promote marketing strategies and there is a need to analyse the payoff of promotional strategies. The commentary of Mr. E was very critical, *"Promotion has a basic rule that was never respected. In Portugal we always faced tourism from a dream perspective. Promotion is the promotion of an image, and it was never seen from* *a commercial perspective. Therefore, it isn't promoted to sell more, but instead because it is nice, because it looks good. The people who come to work in the tourism sector and who are responsible for those areas are dazzled with it, with the trips, the hotels, the lunches and dinners, with this one and that one, with the new world that's been handed to them. So without articulation and integration between product, demand and supply, that naturally involves transportation, commercialization etc., promotion is a bridge to nowhere, and that is what is being done"* and *"What are the criteria for evaluation of promotion's payoff? What are the metrics? All of that has been studied. There are lots of books that explain how to do it. Price strategy. Do we have one? Of that I won't even begin to talk about. And placement? How do we do the placement? What is our strategy?"*

In terms of market investment, the UK market is the number one market in terms of promotion, a reality that takes into consideration the fact that the UK market represents 20% of the total investment in promotion.

In terms of destination promotion's weaknesses and needs, there seems to have been a lack of promotion integrated in the marketing strategy. It is important to analyse consumer behaviour in order to have better promotion and adjust the offer to meet expectations. It is important to have leaders to promote the Algarve and to organize international events to amplify this promotion. It is necessary to invest in promotion to enhance awareness of the destination. However, this promotion should be accompanied by hard-selling campaigns.

Regarding **Awareness of the Algarve**, surprisingly, it only merited brief references from the respondents, focusing on the airport's role, namely the question of having an airport with the name of a city and not the destination name. This is especially important when people book their holidays online. It was stated by Mr. B that, *"If someone doesn't know where Faro is we come to a problem of notoriety. I've tried to do something about that but politically there are some problems. We should have an Algarve Airport instead of Faro Airport. When tourism was based on charters it was insignificant because they bought their vacations to the Algarve and the airport was the last thing on their mind. But when* *you enter a low-cost logic, one is going to find (…)".* New routes benefit from good destination awareness.

Specifically regarding **Destination Image**, this is another area which reveals strong dedication from the representatives of the organizations and a relative degree of consensus. The main topics referred to be linked with the attributes associated with the Algarve's destination image, which according to the interviewees are associated with the friendliness of the people, the gastronomy, the beaches and the golf, the climate and being a family destination. The Algarve´s destination image should be managed in partnership with the national strategy, but decentralized.

One question that was mentioned was that it is important to have a symbol that identifies the country and then sub-brands. And it is important to understand why people book Portugal. In the decision-making process, a short distance is an important factor and it is important to transmit images that reduce the risk in the decision-making process. Image is based on preconceived ideas and does not correspond to what promotion tries to sell, and in this process Portugal is sometimes still associated with being an undeveloped country.

Expectations are an important factor in the satisfaction with a destination and in the beginning everything is intangible. The affective image is very important in the pre-image. It is important to create/transmit an image that pops up in the consumer's mind and enables the consumer to decide. At this point, Mr. B stated that, *"Rarely do we go to a place with high expectations and return satisfied. It is usually the ones that have the lowest expectations that impress us the most"* and *"But in the beginning everything is intangible. Everything is affective. There's nothing cognitive about it".*

Finally, to finish the topic about destination image, consider the issue of **Algarve's destination branding**. Criticism by the organizations' representatives emerged once again, particularly in the discussion about national and regional levels of tourism destination branding. The main topics extracted are linked to the fact that the Algarve brand is established by its product and the Algarve as a whole is a well-known brand. The Algarve's brand has affirmed itself in some external markets due to commercial holiday and distribution suppliers in the issuing countries. International brands help the Algarve to position itself, for example through international hotel chains. The Portuguese Tourism Board worked as a national brand that later adapted to the regions. Regarding branding strategies, the opinion of the stakeholders interviewed is that branding should be done regionally, involving demand and supply, and that we have been promoting a brand dissociated from a business strategy. Branding has strong emotional bonds and the brand is the essence of it all, and management implies coherent strategies based on a trustworthy product.

In conclusion, the respondents are aware of the importance of promotion's commercial perspective, whose actions should be evaluated. Destination image should be managed across complementary scales, national and regional, and summarized as a strong brand that corresponds to territorial characteristics, products and facilities, as well as tourist expectations.

5.2.7 The UK Market

Another theme is specifically the **UK Market in the Algarve**. The opinions were strongly consensual and summarized in two common references, mainly the image that the UK market has of the Algarve as a destination, which has to do with climate, safety when compared with other destinations, gastronomy, nice weather, friendliness, beaches, coastal conditions, the islands and the quality of the infrastructure, and the question of the UK market dimension in the Algarve as a destination. This dimension is huge and justifies a strong commitment due it being a tradition in the Algarve and the important dependence on it of the destination.

5.2.8 Events, Low-Cost airlines and Tourism in High and Low Seasons

The final theme focused on the role of events/animation, low-cost airlines and the high and low seasons in the Algarve**.** This is again a topic that is relatively consensual concerning these broad domains and their importance in the high and low seasons, with several references to the (All)garve programme of events. The importance of animation and **events** to create tourism streams was consensual, but only if they could make a statement and have continuity. The (All)garve program of events was created in 2008 with the goal of upgrading the Algarve´s already existent events calendar. The (All)garve program of events embraces all 16 counties of the region; it covers several domains (culture, music, sports events etc.) and the high and low seasons.

In the stakeholders' opinion, it is necessary to capture events that bring added value to the cultural domain, and it is important to have a good calendar of events, "few but good ones" and it is important to promote these events correctly; they have to have good awareness. The Algarve should invest in sport events, but not finance them, and have an online portal to put cultural information together in a central database. Events are a complement to the product portfolio. It is also important to improve the image.

The importance of animation and events to create touristic streams is a fact, but only if they can make a statement, they should be important and investment should have continuity. Mr. D said, *"Animation and events in the perspective of generating touristic streams makes sense and should be done, but if so there would have to be five or six events, otherwise they won't make a statement. What happens is that we do something great one year and after we don't do it anymore. I'll give you an example of that, the tennis tournament in Monte Carlo. At first the guy had to pay spectators to attend it, and today it is the biggest tennis event in the world"* and *"A dozen anchor events should be arranged, mainly during the low and mid-seasons, that would progressively have continuity, claiming their place in the European events calendar. Sports, cultural – whatever's decided, we have to be innovative".*

The second subject of the final topic developed the importance of the **low-cost airlines**, with the discussion focusing on their effective role in destination diversification but, simultaneously, their tendency to evolve into more medium-price companies and the possible (re)distribution/control of passengers to other destinations.

It seems that the low-cost airline companies that have tour operators are able to monitor the payoff due to overnight stays. These low-cost airlines sell some tickets online and others thorough tour operators. The low-cost companies are good to open gates to diversification, new cities, new routes etc, but it is important to understand if tourists stay in the destination. The substitution of traditional tour operators by low-cost companies enables consumers to have more independence and flexibility.

Ryanair is the only company that has retained its initial business model (only selling flights). Ryanair's ground base is an important incoming door to the Algarve. A global comment was developed by Mr. B, *"For example, today, companies designated as low-cost may be so for their business model, but in terms of cost some aren't low-fare. On that matter, it is important to make this distinction. Another important aspect that I would like to refer to concerns the commercialization method. Most of them sell their product directly, online, but some are assisted by their own tour operator, as does Jet2 that currently has flights to the Algarve originating in seven different airports in the UK, and it sells its product directly to the public through its website, Jet2.com. However, there is also a significant amount that is sold through its tour operator, Jet holidays. This just goes to show that we are witnessing an adjustment to their business model".*

Finally, the stakeholders pay attention to **High and Low Seasons**, a characteristic and simultaneously a problem of the Algarve as a destination. This is a discussion where flight connections and products played a central role.

It is a reality and a (relative) problem that the region has more airline capacity during the summer. This has mainly to do with the market, with Mr. E stating that, *"In the Algarve's case, yes, it's natural because it is mainly touristic. I would almost risk saying it is purely touristic. It is natural that the airline companies allow more capacity during the summer than in the wintertime, but that is something that we as a destination must try to change by creating the skills mentioned in terms of touristic products and attractions that motivate tourist visits outside the high season (…)".* This is related to the fact that the Algarve is dealing with a touristic destination based on the sun and sea product.

5.3 CONCLUSION

Based on the analysis of different interviews and the extraction of the most important quotations, the findings highlight the importance of knowledge of the judgements that support the decision-makers opinions. It is possible to understand the stakeholder priorities addressed through the interviews, which could contribute to improve the strategy definition. The relevance of doing the empirically in-depth interviews is expressed by Yuksel et. al (1999: 359) as it “can provide detailed information on the attitudes of stakeholders to tourism issues and changes in tourism in a destination area”. It is also considered important as the stakeholders don’t have contact with each other although the information collected could be used to “direct stakeholder interaction or collaboration”, a perspective adopted by means of the research.

The findings based on the semi-structured interviews allowed the researcher to measure the range of views obtained on the topic with the most frequent “quotations”, in order to discuss branding and destination implications. Specifically considering the three most important themes among the eight topics analysed, the contribution to strategy from the evidence is the first theme. This includes the preoccupation about the market segments of the Algarve as a destination, the importance of attracting new visitors (besides families) and outside the peak season. It also questions the issue of “losing” some tourists that arrive at Faro airport (to Spain), the competitors in the south of Spain and the question regarding the golf segment competing with high prices. These are the key issues to be monitored and evaluated.

If this is a concern about the Algarve as a destination, it is also recognised in the literature as one of the main questions regarding destinations showing the symptoms of the stagnation stage. As discussed by Butler (1980) if a destination is not attracting “new visitors” – as it happens in the Algarve – then stagnation might become a reality. Martin and Uysal (1990) argue that each life cycle stage will require different strategies and distinct policy responses. Yuksel et. al (1999: 357) also reinforce this idea stating that “tourism planning needs to be dynamic and continuous, able to adapt incrementally and organically to the changing circumstances and needs of destinations”.

The second theme with the highest discussion is an integrated group of three subjects, which are connected with partnerships, the Algarve's destination branding and the low-cost airlines. In the context of partnerships it is important to express the airport's relevance and value to the regional tourism development. This entity acts like an inbound consumer behaviour analyst of the Algarve's demand. Although the airport does not itself attract people to the destination, it is an important element of the infrastructure required to bring tourists, and gives important inputs to the knowledge about consumer behaviour and the Algarve's data management. The partnership with this entity is vital to the Algarve's tourism destination management and it was noted that a partnership between tourism entities and other economic sectors already exists, a management link which is essential to improve the economic benefits of tourism. This preoccupation is shared in the literature by Elbe et. al (2009: 283) when they argue that "in a fragmented context, there is also a risk that some actors resort to free-rider behaviour. Thus, in order to develop an integrated marketing process, the actors need to be brought together in order to make it possible to mobilise resources for co-ordinated destination marketing".

The discussion about the Algarve's destination image stands with the Algarve's destination brand consolidation. The lack of management of the Algarve's brand is a question that concerns the regional entities. Due to this fact, the importance of involving different stakeholders in brand management and having an associated business strategy was underlined. The brand should be worked by considering supply and demand, and it is important to establish emotional links with the Algarve brand. The high number of repeaters could help to capture/ work the emotional links with the Algarve. It is also important to work the Algarve brand with the Portuguese brand in order to have a coherent message.

The theme of the low-cost companies represents an important insight into branding-strategy formulation. Some low-cost companies, due to their business profile, do not have control of the tourist's route in the destination. The tour operators and the low-cost airline companies that have a tour operator are able to monitor the payoff due to overnight stays. The low-cost companies open new gates to diversify tourism but it is important to monitor tourist routes in the destination. The Ryanair ground base is an important incoming door to the Algarve.

Finally, the top three relevant themes include destination image and Algarve competitiveness issues. Based on the stakeholder interviews it is possible to conclude that the core attributes of the Algarve's image are friendliness, gastronomy, climate, family destination, beaches and golf. The importance of managing the Algarve's destination image in partnership with the national strategy was highlighted and decentralizing its sub-brands. Preconceived ideas, expectations, tourism satisfaction, affective image and decision-making processes are a group of factors that should be take into consideration in image analysis as a way to better image management and dissemination.

With regard to competitiveness and Algarve competitors, the tourism stakeholders refer to the south of Spain as the Algarve's main competitor, mainly the Malaga region. They stated that in the competition arena with Spain it is important to have in mind the different dimensions of these two regions (the Algarve and Andalucía). In the context of products and attractions, the Algarve's lack of attractions besides "Sun and Beach" was noted. The importance of having a price "that is worth it" was mentioned. Due to the existing competition it is fundamental to analyse flight connections and the tourist operations between markets. One question that was highlighted was the competition with destinations based on all-inclusive offers. These destinations lack security and compete based on unbeatable prices and questionable policies, namely, in the domains of environment or free-market competition.

CHAPTER 6 – QUESTIONNAIRE DATA RESULTS

6.1 INTRODUCTION

A better knowledge of TDI development is crucial to understanding a destination's options for tourists and to improve destination strategies. There are important influential factors and variables that could affect destination image perceptions. In order to improve the desired destination competitiveness, the importance of a deeper understanding of image awareness and the influential factors that influence tourist perceptions and behaviours are critical to developing correct marketing and destination branding strategies. As stated by Li et al. (2009: 45), "Knowing what visitors and potential visitors think about the destination is essential when developing tourism products and marketing campaigns".

Echtner and Ritchie (2003: 37) state that, "In order to be successfully promoted in the targeted markets, a destination must be favourably differentiated from its competition, or positively positioned, in the minds of the consumers". Stepchenkova and Morrison (2008: 547) state that, "A desirable differentiation and positioning can be achieved by a destination's marketing organization by creating and managing the perceptions, or images, that potential travellers hold about the destination".

This chapter describes and analyses the main results regarding visitors and visit characterization (trip characteristics) of UK visitors coming to the Algarve from Exeter in the UK. These results fulfil a group of objectives defined in the Aims and Objectives section, namely: (3) to compare the profiles and images of four different target markets of visitors: pre/post-visit and peak/off-peak seasons; (4) to investigate the secondary image (pre-visit) as opposed to the primary image (post-visit) of the Algarve as a destination, by applying models of TDI and testing the differences between pre/post-visit and peak/off-peak seasons; (5) to develop an integrated image of the Algarve as a tourism destination; (6) to analyse whether first/repeat visitors and variable image modification have an impact on travel behaviour and visitor profiles.

Visitors and visit characterization consider the results of the main variables of the questionnaire in the pre/post-visit, peak/off-peak segments of analysis, as follows:

- Regarding demographic and travel profiles, the descriptive statistics consider the following variables: gender, age, education level, number of trips per year (average), period of holidays and group profile (group composition).

- Concerning visit characterization, the variables considered were: First-time or repeat visit to the Algarve, number of previous visits to the Algarve and number of years knowing about the Algarve (level of familiarity with the destination), if staying overnight in the Algarve and the respective number of nights, type of accommodation chosen, average individual daily expenses, total and by category.

- Specifically regarding the decision process, the variables analysed were: the sources of information used to obtain information about the Algarve, the reservation process used (booking behaviour), decision responsibility to visit the Algarve, return intention, willingness to recommend the Algarve and the antecedence in booking the Algarve (in months).

All these variables help develop of a better understanding of the target markets' profiles in the peak/off-peak seasons, and pre/post-visit, which allow testing the differences between these different target markets and fulfilling objectives 3 and 4 of the thesis.

In a second section, the data collected in the open-ended questions are explained: decisive factors to choose the Algarve as a destination, destinations in competition with the Algarve, websites consulted to find information about the Algarve, stereotypical images of the Algarve measured through keywords and, finally, place preferences within the Algarve. These variables allow confirming the selected attributes, as defended by Echtner and Ritchie (1993: 5), supporting a "combination of structured and unstructured methodologies" and, at the same time, make a contribution to enhance destination branding and management as defined in objective 7 of the current research.

In Section 6.3, destination image evaluation is analysed in detail. In the first instance, the image's main differences between the pre/post-visit and the peak/off-peak segments are tested. This analysis helps to understand the main differences between the samples as well as provide a profile of the Algarve's TDI in different segments. At the end, a factor analysis was performed regarding the Algarve's cognitive attributes in order to reduce them to a more manageable image perception. The attributes regarding affective image were not considered due to their reduced number and the lack of possible management intervention in these factors. These results reinforce the achievement of objective 4 with an extension to the pursuit of objectives 5 and 6 of the thesis.

Finally, in Section 6.4, the differences between first-time and repeat visitors and image modification were tested with the main variables regarding visit and visitor profiles, which enable reaching objective 6 of the thesis.

6.2 Factors Influencing Destination Image

6.2.1 Visitor and Visit Profiles

The factors influencing destination image are organized through nine modules of information. In sequential order, these nine modules are aggregated into two sections, the first, 6.2.1, focuses mainly on the socio-demographic characteristics of visitor and visit profiles, and the second, 6.2.2, on visitors' travel behaviour and stereotypical images of the Algarve in open-ended questions. These variables were considered in order to have a better understanding of this segment of the Algarve and propose specific branding and management practices for this market. The variables were selected taking into consideration the main authors' in the study of tourism destination image and its influential factors studied in different contexts, as defined in Chapter 3, which deals with the research methodology.

The current section, 6.2.1, contains four modules: (1) visitors' demographic characteristics and their travel profiles, (2) visit characterization, (3) travel-decision process, (4) a time-gap reservation analysis. The next section, 6.2.2, includes: (5) the Algarve´s decisive factors, (6) competitive destinations seen as possible alternatives to the Algarve, (7) the websites used to get information, (8) Algarve stereotypical destination images' most common keywords and, finally, (9) place preferences within the Algarve. Each of these themes is analysed simultaneously through the samples: pre vs. post-visit and peak vs. off-peak season. The main tendencies are emphasized, as well as differences, if they occur.

Considering the data collected about visitors and visit characterization, it is possible to conclude that there is a general balance between the genders, with a small advantage for males (Table 6.1). This equilibrium is probably due to the fact that, in general, eight in ten respondents are travelling with family/children or with partner/husband or wife. In general, they are over 45 years old. It is evident that for these visitors, the Algarve is a destination they choose during middle age with 41.1% to 46.6% being between 45 and 64 years old, or even at or over retirement age with 21.2% to 36.0% over 65 years old. This introduces the perspective of a possible potential grey tourism destination. These tourists have a tendency to have a high level of education, with 37.9% to 45.2% being up to university standard.

As can be seen in Table 6.1, respondents travel on average three times per year, mainly in the summer, Easter, Christmas and/or New Year, the typical tourist seasons due to professional or children's school-time restrictions. The retired segment might be a possible exception for this concentration during the holiday periods, with 36.0% of the winter tourists over the age of 65.

TABLE 6.1 – DEMOGRAPHIC AND TRAVEL PROFILES: PRE VS. POST-VISIT AND PEAK VS. OFF-PEAK VISIT

Demographic and Travel Profile	Pre-Visit n=221	Post-Visit n=495	Peak n=315	Off-Peak n=332
Gender				
Male	54.5%	53.9%	45.7%	46.1%
Female	45.5%	46.1%	54.3%	53.9%
Age				
Under 24	9.5%	7.3%	11.2%	4.8%
25-34	5.4%	7.5%	8.9%	4.8%
35-44	10.5%	13.7%	17.6%	7.8%
45-54	27.1%	24.2%	26.0%	24.3%
55-64	14.9%	20.4%	15.1%	22.3%
Over 65	32.6%	26.9%	21.2%	36.0%
Education Level				
Without Studies	14.0%	10.5%	11.5%	11.5%
Primary/Secondary Studies	34.0%	45.1%	40.1%	43.9%
University	44.7%	40.5%	45.2%	37.9%
Other	7.3%	3.9%	3.2%	6.7%
Number of travels per year (average):				
Number	3.3	3	3	3.2
In which period				
Summer	49.2%	49.8%	51.6%	53.6%
Christmas/New Year	17.6%	15.9%	18.2%	15.9%
Carnival	3.3%	2.8%	3.8%	0.7%
Easter	19.6%	19.9%	18.2%	17.4%
Other	10.3%	11.6%	8.2%	12.4%
Group profile				
Travelling with family/with children	43.8%	38.2%	56.4%	24.1%
Travelling with partner/husband or wife	40.5%	45.2%	29.8%	60.3%
In an organized group tour	4.4%	3.6%	1.0%	6.7%
Travelling with friends, colleagues	11.3%	13.0%	12.8%	8.9%

Source: Author's fieldwork.

Considering visit characterization (Table 6.2), the analysis points out that most visitors had previously been to the Algarve about seven to nine times and already knew about the Algarve for about 18 years. This highlights the importance of knowing what kinds of behaviour and characteristic's these 'loyal to the destination' tourists have, a subject analysed in Section 6.4, focusing on first-time visitors vs. repeaters, and as discussed by Beerli and Martín (2004) and Chi (2012).

This familiarity/loyalty with the destination, when tabulated with tourist age, shows that the Algarve is a repeat destination that has already been sought by these tourists for almost two decades. This relationship emphasizes a typical destination dilemma, since from one side it reveals an excellent degree of loyalty to the Algarve, which is important for destination fidelity, but, simultaneously, when compared to the fact that for only 26.3% to 28.1% of respondents this was their first-visit to the Algarve, then a rejuvenation problem might occur for the Algarve's tourism stability in the medium to long term. These results strengthen the need for a more detailed analysis in the study regarding first-time and repeat visitors, identified as a gap in the literature by different authors.

TABLE 6.2 – VISIT CHARACTERISTICS: PRE VS. POST-VISIT AND PEAK VS. OFF-PEAK VISIT

Visit Characterization	Pre-Visit n=221	Post-Visit n=495	Peak n=315	Off-Peak n=332
First visit Algarve				
Yes	28.1%	26.4%	26.3%	27.5%
No	71.9%	73.6%	73.7%	72.5%
Number of previous visits (average)				
Number	9.2	9.7	8.8	7.5
Number of years know about Algarve				
Less than a year	7.8%	4.1%	6.0%	4.5%
More than a year	92.2%	95.9%	94.0%	95.5%
Number of years know Algarve in average	18.2	18.5	18	18.7
Stay overnight in the Algarve				
Yes	95.4%	95.9%	96.0%	95.5%
No	4.6%	4.1%	4.0%	4.5%
Number of overnights (average)				
Number	9.2	9.4	9.8	9.0
Type of classified lodging				
Hotel, Apart-hotel, holiday complex…	46.6%	41.7%	32.4%	54.2%
Own house	12.2%	15.1%	15.6%	12.8%
Rented house	26.2%	22.1%	29.7%	17.0%
Friends and relatives house	15.0%	21.1%	22.4%	16.1%
Average individual daily expenditure				
Pounds	£ 95.72	£ 105.80	£ 106.41	£ 94.39
Expenditure percentage by item				
Accommodation	36.2%	33.5%	45.3%	43.0%
Food and Beverage	28.8%	32.1%	24.9%	25.5%
Internal Transport	6.3%	7.8%	5.7%	6.7%
Shopping	9.7%	10.1%	8.1%	7.8%
Entertainment	9.7%	10.2%	8.0%	8.2%
Others	9.3%	6.3%	8.0%	8.8%

Source: Author's fieldwork.

The majority of UK visitors stay overnight in the Algarve, although about 5% of respondents stated that they stay in an accommodation outside the Algarve. This result could have many possible interpretations, although it is believed that the respondents that do not stay in the Algarve may stay nearby, for example in Spain, mainly in the south of Spain, i.e. Andaluzia. This was later confirmed by the several references to the “proximity to Spain” or “closeness to Spain” included in the Algarve destination keywords and in the decisive factors (convenience category) analysed in Section 6.2.2. For those who stay in Spain near the Portuguese border, Faro International Airport is much closer in time and distance than the Spanish Sevilla International Airport.

In terms of the number of overnight stays in the Algarve, the average stay is about nine to ten nights, generally in a hotel or rented house. This overnight length, curiously with no significant difference between peak/off-peak seasons, is a positive characteristic of these visits to the Algarve, being in general superior to the usual destination figures, which in 2011 for the classified accommodation sector, were 4.7 nights for all markets and 5.6 nights for the UK market, being relatively consistent in recent years (IMPACTUR, 2014).

Regarding tourism expenditure, the daily total expenditure and a disaggregation by category were analysed. This information was collected because it is relevant to understand the global economic impact of this market on the Algarve as a destination, in order to promote a possible cost-benefit analysis supported by correct branding strategies and improving the destination’s economic-expenditure development and sustainability as highlight by Leisen (2001).

A previous methodological point should be noted, emerging from the fact that, for average expenditure calculation and as recommended by Arrow et al. (1993), a conservative view was adopted in order to avoid possible outliers or biased protest-answers, an option which resulted in the exclusion of 5% of observations at the extremes of both classes, conferring less scatter in the data distribution.

The results point to average individual daily expenditure that ranges from £94.39 to £106.41, with the biggest expenses, as expected, concentrated in the categories of accommodation and food and beverages, which when added together always exceeded 60% of total daily expenditure. Considering that official Portuguese statistics (Statistics Portugal) and the Portuguese Tourism Board have not published these figures for the regions since 2001, these are statistics with no official or available actual comparison. In 2001 the estimated value was €91.78 (Statistics Portugal, 2010), which supports the research figures of £94.39 to £106.4, given there was a regular price/inflation and a euro currency appreciation regarding the pound sterling throughout this 10 year gap.

The research data point out that the visitors' expenditure profile is slightly different between pre/post-visit. Visitors express that they intend to spend less in the pre-visit sample then in the post-visit sample, respectively £95.72 to £105.80. This expectation of a lower expenditure during a pre-visit could be linked to the so-called "attitude of precaution" of tourists while completing the questionnaire. This is a common trend in answers connected with expenditure using open-ended questions in scenarios of some uncertainty (Cameron, 1988), as the questions regarding expenses used in the present research, with a questionnaire being applied before the visit, when tourists did not have accurate perceptions of day-to-day expenses.

The increase in expenditure on post vs*.* pre-visit is mainly linked to a rise in spending in the food and beverage category, a result that emphasizes the importance of gastronomy and food in the Algarve, which constitutes a significant cultural and identity factor in improving the destination's economic competitiveness, as further discussed in the stereotypical image variables in Section 6.2.2.

Regarding expenditure analysis, a final point concerns the relation between peak/off-peak season's spending. In these two samples, the values range from £106.41 to £94.39, and the categories of accommodation plus food and beverage maintain a combined percentage constantly superior to 60%, despite some changes, as pointed out later on. While noting the lack of published official tourism statistics, it is possible in the peak season to have a comparative reference for this value by considering a study of Portimão's summer tourist profile in the Algarve region (one of the three biggest municipalities in the Algarve in terms of tourism market), where the average UK individual daily summer expenditure in 2008 was €115.78 / £102.93 (CIITT, 2009).

In off-peak there is a minor reduction in expenditure on accommodation; however, it does not achieve a gap dimension as might be expected, mainly due to the fact that, as presented in Table 6.2, about three in ten tourists stay in their own house or at a friend or relative's house, which makes this category of expenditure relatively constant and insensitive to the season of the visit. From summer to winter the price reduction in hotels and similar establishments in the Algarve might reach up to 60% (Perna et al., 2013).

Focusing on the variables in the travel-decision process, from the data summarized in Table 6.3, it is possible to point to the particular relevance of friends and relatives' recommendations as a source of information about the Algarve, with the Internet being the second-most important source of information. The cumulative results are always around or greater than 60% of possible available sources. A confirmation of this result is later achieved by the presence of a number of references, such as "word of mouth" or "family" recommended' in the decisive factors (recommendation category) to visit the Algarve as analysed in Section 6.2.2. As a result, the WOM promotion is an unequivocally important promotion vehicle, with the consequent importance of the destination fulfilling visitors' expectations between pre/post-visit.

With regard to the Internet, this is a source whose content destination managers do not entirely control, as noted in Chapter 3, regarding models of image formation based on sources of information (Gartner, 1993). This source of information is described as Overt Induced I in Gartner´s model and normally considered to have low credibility (depending obviously on the source) but high market penetration. This is relevant to the opinions expressed on social networks and websites such as TripAdvisor. As a result, this situation leads to the need to promote a good visitor experience. Cumulatively, as respondents fly to the Algarve using low-cost airlines, the Internet will undertake an important role as a way of booking holidays.

The decision to travel to the Algarve is in more than 60% of cases, as shown in Table 6.3, a fully individual responsibility of the person who completed the questionnaire or his/her partner. Curiously, only between 11.5% and 17.4% considered this decision process to be at first an individual suggestion followed then by a joint decision.

TABLE 6.3 – TRAVEL-DECISION PROCESS: PRE VS. POST-VISIT AND PEAK VS. OFF-PEAK VISIT

Decision Process	Pre-Visit n=221	Post-Visit n=495	Peak n=315	Off-Peak n=332
Sources of Information about the Algarve				
Internet in general	26.9%	25.1%	27.7%	29.2%
Friends and relatives recommendations	35.7%	32.5%	37.8%	36.9%
Advertisements (magazines, television, leaflets,…)	5.3%	5.1%	5.5%	4.5%
Guidebooks	8.3%	6.3%	4.5%	6.8%
Other books and films	1.4%	0.7%	2.1%	1.0%
Travel agencies/Airlines/Hotel website	6.4%	9.6%	4.9%	11.1%
TV programmes	2.8%	2.0%	1.5%	1.6%
Tourist information centre (including the	1.1%	1.1%	1.1%	0.8%
Embassy, consulate	0.3%	0.1%	0.5%	0.0%
Tour operator brochures	1.9%	2.9%	0.8%	2.7%
Social Web (blogs, facebook, etc)	0.0%	0.9%	1.0%	0.6%
Web-communities (TripAdviser)	0.8%	2.2%	1.9%	2.7%
A previous visit	7.2%	10.0%	9.4%	1.8%
Other	1.9%	1.5%	1.3%	0.4%
Which mean was used to make the				
Travel Agency	7.0%	9.5%	5.1%	12.4%
Internet	74.4%	76.4%	81.5%	72.3%
Friends and relatives	11.2%	8.5%	9.8%	7.8%
Telephone	3.7%	2.7%	2.1%	3.2%
Other	3.7%	2.9%	1.5%	4.3%
Who decided to come to the Algarve				
Myself	30.2%	32.0%	35.5%	27.2%
My partner/husband or wife	35.5%	28.5%	26.4%	35.1%
I suggested and we decided jointly in family	12.0%	15.6%	17.4%	11.5%
My partner/husband or wife suggested and	8.7%	12.3%	8.0%	14.5%
The children /my sons decided	2.5%	0.7%	1.5%	1.0%
Some friends decided	6.6%	7.1%	7.7%	6.1%
Other	4.5%	3.8%	3.5%	4.6%
Return intention				
Summer	84.4%	88.7%	92.0%	82.7%
Winter	42.7%	47.4%	41.0%	50.0%
Will you recommend the Algarve				
Yes	87.6%	97.0%	93.4%	94.7%
No	12.4%	3.0%	6.6%	5.3%

Source: Author's fieldwork.

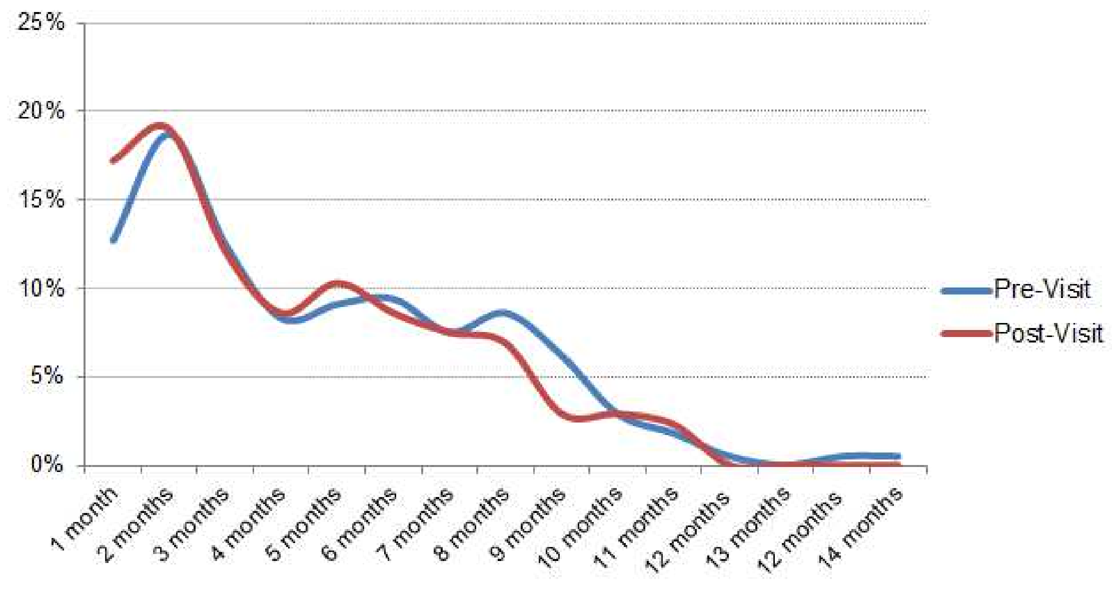
Despite some lack of expectations, fulfilment between pre/post-visit perspectives, as analysed in Section 6.3, is unequivocally expressed by the UK tourists interviewed along two variables: the return intention and the recommendation of the Algarve. The tourists intend to return to the Algarve in the peak season, with a percentage between 82.7% and 92.0%, and in winter with a percentage from

41.0% to 50.0%. Despite the traditional seasonality gap in demand as expressed by these figures, such percentage dimensions can only reveal a good level of satisfaction with the destination, as well as a strong degree of loyalty, as previously reported.

These results and perspectives emerging from the decision process are reinforced by the fact that 87.6% to 97.0% of the respondents manifest a clear intention to recommend a visit to the Algarve region. The importance of these figures is even more decisive when, simultaneously, as previously analysed, around 60% of the sources of information used to find information about the Algarve destination are friends and relatives and the Internet.

Finally, the research aims to measure the gap (in months) between the reservation time and the visit itself, in a context in which the Internet plays a relevant role. As shown in Figure 6.1 and 6.2, there are no relevant differences between the samples and the main tendency is to make a booking about two months before the visit, with almost 20% of respondents adopting that behaviour, or even just one month before in about 15% of cases. Particularly for the peak tourism flows of July and August, these gaps make the months of May and June critical to the booking-decision process and destination commercialization.

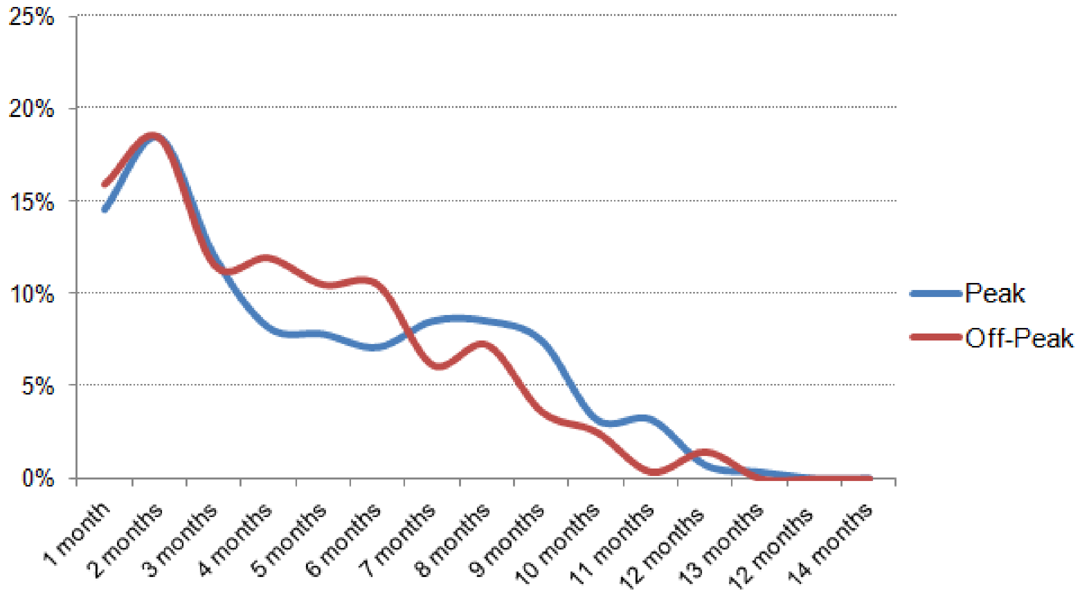
FIGURE 6.1 – TIME RESERVATION DECISION GAP BEFORE VISIT: PRE VS. POST-VISIT



Source: Author's fieldwork.

When considering peak/off-peak visit behaviour, there is the same consistency for the decision about one or two months before the visit. However, it should be noted that there is an important group that makes their visit decision with more notice in the peak sample, namely seven to nine months before, perhaps seeking to achieve lower prices, particularly for flight fares.

FIGURE 6.2 – TIME-RESERVATION DECISION GAP BEFORE A VISIT: PEAK VS. OFF-PEAK



Source: Author's fieldwork.

In summary, it is possible to point out that UK tourists flying from Exeter Airport to the Algarve are generally over 45 years old, with a significant winter segment of tourists over 65 years old, with both groups tending to have a higher education. They stay for about nine or ten nights, usually in a hotel, rented house or even friends' and relatives' houses. The overnight length is superior to the Algarve's global figure, an important result for the economic return of this particular market.

These tourists have sought the Algarve for almost two decades. This can be considered a destination management dilemma between loyalty and the need to search out new visitors, since only 26.3% to 28.1% of respondents were first-time visitors.

Their average individual daily expenditure ranges from £94.39 to £106.41, with the biggest expenses, as expected, in the categories of accommodation and food and beverages. In the post-visit sample, there is an increase in the percentage of expenses in the food and beverages category, and in the winter sample there is a minor reduction in the expenditure on accommodation. This does not achieve a higher gap as might be expected, mainly due to the fact that an important group of these tourists stay in their own house or in a friend or relative's house.

When searching for information about the Algarve, friends and relatives' recommendations are the most important source of information, followed by the Internet, which emphasizes the need to have correct destination management/influence on overt induced I and solicited organic sources of information, as defined by Gartner (1993). Generally, the UK tourists interviewed were pleased with the destination, revealing an intention to return to the Algarve in summer from 82.7% (off-peak) to 92.0% (peak) and in winter from 41.0% (peak) to 50.0% (off-peak), with the usual seasonality gap. About nine in ten recommend a visit to the Algarve; a visit that they usually made with a reservation just one or two months before the visit itself.

6.2.2 Travel Behaviour and Stereotypical Image dimensions

After Section 6.2.1, with its four blocks of analysis (demographic, travel profile, visit characterization and decision process) in which the quantitative approach is dominant, Section 6.2.2 develops the study of the Algarve from a broader perspective, in which travel behaviour and image stereotypes of Algarve are considered using a block of five main qualitative variables, namely (5) the reasons that support a preference for the Algarve, (6) other destinations considered as an alternative to the Algarve, (7) information about the websites used to collect information about the Algarve, (8) the global stereotypical image that these tourists have of the region and, finally, (9) their place preferences within the Algarve.

During this research, and particularly in this section, the free elicitation method through open-ended questions was used. Considering the large dimension of the samples this is the best method to capture "salient and organic images of a destination" as defended by Lin et al. (2012: 384). The qualitative dimension of destination image, although difficult to measure, is important in order to analyse the holistic and unique dimension of destination image. As stated by Stepchenkova and Morrison, (2008: 550) these kinds of data “do not facilitate statistical and comparative analysis of destination images”. The decisive factors to visit the Algarve and three keywords associated with the Algarve were introduced in the questionnaire to capture how the Algarve is characterised and viewed in the perspective of the UK traveller’s sample.

Other methods could be used (namely in-depth interviews and focus group) which might provide other detailed considerations behind the phenomenon, although these methods will only be practicable for small sample sizes. Regarding data analysis, the study used content analysis as applied by Lin et al. (2012) and Stepchenkova and Morrison (2008). This is a widely accepted method and it is increasingly used for this type of data analysis. The mix of structured and unstructured questions included in the questionnaire was considered the best way to produce clear and successful inputs to the model articulation as defended along the literature review regarding destination image measurement. Considering that the research already measures the same phenomenon through quantitative data, the free elicitation data is considered a complement and an enrichment to the overall destination image measurement, namely by the ability to identify new attributes, confirm the important level of the previously ones identified by the review of literature and allow the identification of a possibly further deeper attribute analysis. Future research can explore this free elicitation data in terms of the positive and negative aspects of destination image and more profoundly the visitor’s feelings and perceptions about the Algarve, namely through a specific questionnaire regarding the dimensions of the affective image, stereotypical holistic images and unique images as shown in the study developed by Stepchenkova and Morrison (2008). However, as discussed in the context of objective 5 in the thesis introduction, it was not the intention of this study to further explore this particular area of research.

The data analysis of this section is more extensive and contains a higher degree of subjectivity when compared with the previous one. However, an effort was made to analyse these themes again in both sample pairs, pre vs. post-visit and peak vs. off-peak visit, aiming to detect global tendencies and differences if they occur. The data are organized in tables, as follows:

- Decisive factors about the Algarve: Tables 6.4, 6.5, 6.6 and 6.7;
- Destinations in competition with the Algarve: Tables 6.8, 6.9, 6.10 and 6.11;
- Websites consulted about the Algarve: Tables 6.12, 6.13, 6.14 and 6.15;
- Algarve stereotypical images: Tables 6.16, 6.17, 6.18 and 6.19;
- Places chosen within the Algarve: Tables 6.20 and 6.21.

With regard to the decisive factors about the decision to visit Algarve, it can be perceived in Tables 6.4, 6.5, 6.6 and 6.7 that the most important factors are the weather conditions, air accessibility and accommodation availability, a trilogy for resort destinations, further supported by other factors as atmosphere or hospitality, among others.

Considering the foremost importance of the weather conditions, this factor leads the visitors' open-ended answers in all of the four questionnaire moments, pre/post-visit, peak/off-peak, aggregating respectively 23.8%, 22.7%, 21.4% and 24.4% of the all mentioned factors along samples. These figures are extremely relevant and, being an advantage of the destination, they simultaneously reveal a critical competitive issue, since it is not possible for destination planners to manage or control it. Cumulatively, the Algarve is not the only destination that benefits from weather conditions with "sunshine", "not to hot", "warm" or "late sun", among others, as expressed by tourists. This empathizes the importance of the other decision factors for the destination's competitiveness as well as a detailed knowledge about concurrent destination identification.

TABLE 6.4 – ALGARVE DECISIVE FACTORS, MOST COMMON WORDS PRE-VISIT

Category	Factors Mentioned	% of Total
Weather conditions	Climate, Weather, Not too hot.	23.8%
Air Accessibility	Easy Flights, Closeness to UK.	14.7%
Accommodation Availability	Friends / Family have a house, Family live here, Home owner, Friends have a house, Own home, Daughter has a boat here, Accommodation, Time share, Belong to MPB property land, Go to same villa, All inclusive apartments, Resorts.	9.8%
Beaches and Scenery	Beaches, Scenery, Sea, Sea and sun, Good waves, Love Algarve, Love Algarve/Nice Place, It´s a beautiful place, Like it, Lovely coast live, Amazing scenery, Remote nature of western Algarve.	8.2%
Visiting Friends and Relatives	Visiting Friends / Family.	7.6%
Hospitality	Friendliness, Family friendly.	7.4%
Other Aspects	I am staying in the Alentejo, Live Portugal, Past experience, Peaceful, Parents decision, Time of year, Dates, Instability for other destinations, Not too hot, Safe.	4.5%
Activities	On a conference, Research expedition, Sailing, Surgery, Course, Childrens activities, Work, Surf, Bowls holiday.	4.1%
Gastronomy	Food, Good restaurants, Restaurants.	3.7%
Price and Value	Cheap / Prices, Cost, Price, Economic, Its a free holiday, Cheaper, Cost of holiday, Good deal on villa, Last minute holidays.	3.4%
Golf sport	Golf.	3.1%
Recommendation	Parents decision, Word of mouth, Recommendation.	2.9%
Familiarity	Been here before.	2.0%
First Visit	Never been hear, Lovely, Never been before.	2.0%
Convenience	Closeness to Spain, University field.	1.7%
Cultural Experience	Culture.	1.1%

Source: Author's fieldwork.

Throughout the samples, the accommodation factor is another evident category, particularly in the type of accommodation available in the Algarve, which is considered appropriate to family holidays, with its importance ranging from 9.8%, 16.8%, 14.5% and 17.5% along the pre/post-visit and peak/off-peak samples. It seems that the Algarve is chosen as a holiday destination for some visitors due to the accommodation convenience and cost, respectively the mentioned facts that "friends and relatives have a house" or "own house of the visitor" and the "good deal on villa" or "last minute holidays" later referred in the price and value factors. In particular, the economic perspective, based on the existence of friends and relatives with their own house in the Algarve, or even the second residence of a property-owner by the interviewee, reveals a compromise with the destination that only loyalty to the Algarve can support, as expressed in the previous section. Both perspectives represent an important influence to reduce the costs of holiday/travel expenses and an important factor of loyalty with the destination.

TABLE 6.5 – ALGARVE DECISIVE FACTORS, MOST COMMON WORDS: POST-VISIT

Category	Factors Mentioned	% of Total
Weather conditions	Climate, Climate in September, Hot weather, Sun, Sunshine, Temperature, Late sun, Warm, Not too hot, Sun and beach, Hot weather.	22.7%
Accommodation Availability	Familiar, Family accommodation, Group holiday, Have a villa here, Holiday home, Home owner, House exchange, House here, Offer of acommodation, Friends/Family have a house, Friends/Family live here, Friends/Family have a house, Accomodation availability, Boat in Portimão, Accomodation, A hotel we like.	16.8%
Air Accessibility	Easy flights, Direct flights, Flights, Closeness to UK, Flight time, Flybe flight, Proximity to Faro Airport, Late flight availability.	12.3%
Hospitality	Friendliness, Hospitality, Friendly people who speak English, People.	6.9%
Beaches and Scenary	Beaches, Nice Beaches, Sandy beach, Beautiful beaches, Alvor beach, Scenery, The Beauty, History, Atmosphere, Culture, Vilamoura lovely, Country, Landscape, Surroundings, Right time of day.	6.1%
Visiting Friends and Relatives	Visiting Friends / Family, Friends / Family live here, Meeting friends, Staying with friends, Wedding of friends, My daughter married a Portuguese.	4.9%
Activities	Bowling, Browns sport complex, Bowls holiday, Bird watching, Bike racing, Football tour, Attending a conference, Child friendly facilities, Football, Horses, Sailing, Singing engagements, Sport, Surf, Surf west coast, Swimming, Rally, Yoga Retreat, I got a job for the Summer, Business, University Work.	4.1%
Atmosphere	Favourite place, For change, Quiet, Love it here, Ambience, Way of living, Love the area, Lagos - my old city, Nice atmosphere, Rest and relaxation, Pretty, Nice views, Place, Slow pace of life, Known as a holiday area, Peace, We like it here, Safety, Inexistent, Eight tunes, We like Vilamoura, Unspoilt (west Portimão), We love the Algarve, No booze problems.	3.8%
Convenience	Flight time, Comfort, Convenience, Departure location, Ease to transfer, Facilities, Flybe flight, Knowledge, Length of journey, Locality, Great facilities, Beside the sea, No space on other flights, Quick booking / Last minute, Proximity to Faro Airport, Went to Spain, No time difference.	3.2%
Price and Value	Cost, Cheaper, Free holidays, I won the accommodation, Last minute availability, Last minute holiday, Club share owner, Money, A good deal on a villa, Cheap flight, Cheap alcohol, Cheap beer, Cheap wine, Price, Value for money, Tax.	3.2%
Other Aspects	English spoken, Cape Verde, Moto Club Faro, Organised by a chair-group, Used to live here, Chilling, Girls, Length of nights, To explore Algarve, Visited 30 years ago and loved it, Alcohol.	3.1%
Golf sport	Golf, Golfing opportunities.	3.1%
Gastronomy	Food, Nice food, Good food, Cuisine, Food, Picanha, Love the food, food way of life.	2.7%
Recommendation	Recommendation, Hear abouit it, Advertising, Mom booked it.	2.7%
Familiarity	Been previously.	2.2%
First Visit	Not been before.	1.1%
Family Oriented	Family decision, Family holiday, Family stays here, Family environment, Family, Family values, Familiarity, My wife has children.	1.1%

Source: Author's fieldwork.

With appropriate weather conditions and accommodation availability, the destination's approachability link is established by air accessibility, a factor widely mentioned by the tourists as: "easy flights", "closeness to UK" or "late flight availability", among others. The importance of this factor is demonstrated by its mentioned words along the pre/post-visit, peak/off-peak samples, aggregating respectively 14.7%, 12.3%, 11.3% and 14.2% of the all stated factors throughout the samples.

Another relevant Algarve decisive factor pointed out by UK tourists is the atmosphere, especially when considering the peak/off-peak analysis as summarized in Tables 6.6 and 6.7. It is not only the figures of 9.9% quoting the atmosphere as a decisive factor in peak and 5.7% in off-peak season that emphasizes the atmosphere's importance, but furthermore the qualitative items identified within this content, namely those that allow characterizing the identity and feelings of a region. Under the atmosphere category, there are factors associated with references that are cultural and structural for the destination, such as "way of living", "favourite place", "language" and others that are possible to manage into a certain degree by regional planners and decision-makers, such as "safe", "unspoilt" and "known as a holiday area". As a global and qualitative factor, the atmosphere may be one of Algarve's characteristics that allows its differentiation from other destinations, particularly those in which the previous categories about weather conditions, air accessibility and accommodation availability might have a similar level of importance.

This atmosphere is linked with another decisive factor: hospitality. This mentioned aspect is quite stable along the samples, varying between 6.9% and 7.4% of all references, in which are common allusions to "people", "friendliness" and "friendly people who speak English", among others, a social background that reinforces the "love in here" atmosphere.

TABLE 6.6 – ALGARVE DECISIVE FACTORS, MOST COMMON WORDS: PEAK

Category	Algarve Decisive Factors Mentioned	% of Total
Weather conditions	Climate, Climate in September, Weather, Sunshine, Sun, Hot weather, Not too hot, Warm.	21.4%
Accommodation Availability	A hotel we like, Accommodation, Availability, Belong to MPB property land, Home owner, Own home, Own house, Club share owner, Timeshare, House here, Free accommodation, Have a villa here, Resort, Holiday home, Friends/Family have a house, Hotel choice, Hotel location, Good accommodation, Riu Palace Hotel, Resort Preference, Quality in accommodation, Small villages, Villa, All inclusive, Apartments, Hotels, Offer of Accommodation, Vilavita, Knew of a Fab Hotel, Monte Santo Resort.	14.5%
Air Accessibility	Closeness to UK, Easy flights, Flight Time, Easy, Flight, Late flight availability, Ease to transfer, Length of journey, Proximity to Faro Airport, Close to Faro Airport.	11.3%
Atmosphere	Way of Living, Love the area, Comfort, Nice atmosphere, Nice views, Slow pace of life, Peaceful, Safe, Chilling, Change, Cape Verde, Love Algarve, Enjoyment, Advertising, Very spintle, Rest and relaxation, Quiet, Scenery, Lagos - my old city, Pretty, We like it here, Remote nature of western Algarve, Its a beautiful place, Unspoilt, Known as a holiday area, Language, Landscape, Comfort, Safety, Like it, English spoken, Moto Club Faro, Word of ear, Laid Back, Instability for other destinations.	9.9%
Hospitality	Friendliness, Family friendly, People, Hospitality.	7.2%
Visiting Friends and Relatives	Visiting Friends/Family, Wedding of Friends, Friendly people who speak English, Staying with friends, My daughter married a Portuguese, Parents live in Spain, Meeting friends.	6.7%
Activities	Birdwatching, Browns Sport complex, Business, Golf, Golfing opportunities, Football, Sailing, Horses, Surf, Yoga Retreat, Surfing, Football Tour.	5.0%
Gastronomy	Food, Free Food, Picanha, Sardines, Cheap wine, Nice food, Cheap Beer, Cheap alcohol, Good restaurants, Good food+cheap wine, Love the food, Way of life, Alcohol.	4.4%
Beaches	Beaches, Beaches weather, Good waves, Beach, Good beaches, Nice beaches, Beach, Beautiful beaches.	4.3%
Price and Value	Cheaper, Cost, Good value price, Cheap flight, Prices, Free holidays, Cost of holiday, Its a free holiday, Free motorway, Economic, Tax, Good deal on villa.	3.8%
Recommendation	Recommendation, Sister recommend, Chosen by family, Parents decision, Family decision - father.	3.3%
Familiarity	Been here before, Been previously, Familiarity.	2.2%
Sea	Sea, Seaside, Sea and Sun, Sun and Beach, Lovely coast life, Sand.	1.6%
First Visit	Never been heard lovely, Not been before, Never been before.	1.4%
Cultural Experience	Country, Culture, History.	1.1%
Family Oriented	Child friendly facilities, Child friendly, Family, Family environment, Family, Childrens activities, Family live here.	1.1%
Convenience	Quick booking / Last minute, Available dates, Departure location, Timing, Last minute availability.	0.8%

Source: Author's fieldwork.

TABLE 6.7 – ALGARVE DECISIVE FACTORS, MOST COMMON WORDS: OFF-PEAK

Category	Algarve Decisive Factors Mentioned	% of Total
Weather conditions	Late Sun, Sunshine, Sun, Autumn Sun, Climate, Temperature, Weather.	24.4%
Accommodation Availability	Friends / Family live here, Friends / Family have a house, Visiting Friends / Family, Family accommodation, Family stays here, Daughter has a boat here, Friends are residents, Hotel, Good choice of villas, The accommodation/Villa, Regular visit to villa, Boat in Portimão, I won the accommodation, Porto Bay hotel, Accommodation availability, Short break, Cheap accommodation, Sandy beach, Nice villas, Go to same villa, Holiday hotel, Nice resort, Resorts, Great facilities, Choice of hotels apartments, Visiting an Eco Village. Home owner.	17.5%
Air Acessibility	Easy flights, Closeness to UK, Locality, Specific location, Air acessibility, Flight times.	14.2%
Activities	Golf, Bike racing, Bowling, Bowling Tour, Bowls holiday, Golf facilities, Surf, Swimming, Surf west coast, Sporting facilities, Sailing, Birdwatching, On a conference, Research expedition, Organised by a chair-group, University field course, Singing engagements, Surgery, University work, Planned Tour, Work.	9.1%
Hospitality	Friendliness, People.	6.9%
Atmosphere	Love in Here, Favourite place, Nice atmosphere, Love Algarve, Love Algarve / Nice Place, Scenery, We love the Algarve, Amazing scenery, Ambience, Visited 30 years ago and loved, Clean, No Booze Problems, Surroundings, Peace, Quiet, We like Vilamoura, Quiet, Inexistent, Time, Place, Liked it very much, To explore Algarve, Live Portugal, Unspoilt (west Portimao), Culture.	5.7%
Visiting Friends and Relatives	Friends/Family live here, Visiting Friends/Family, Family stays here, Friends are residents.	3.4%
Recommendation	Recommendation, Mom booked it, Hear.	3.1%
Beaches	Beside the sea, Beaches, Beautiful beaches, Alvor beach, Beach, Waves, Sea.	2.8%
Gastronomy	Food Weather, Food, Food and drink, Good food, Cuisine, Culture, Food, Restaurants.	2.5%
Familiarity	Been Previously.	2.3%
Other Aspects	No space on other flights, Abroad, Present, Closer than Florida, Lack of traffic, Escape, For change, Knowledge.	2.3%
Price and Value	Cheaper, Price, Cheap / Prices, Cost, Money, Value for money.	1.6%
Family Oriented	Family, Familiar, Family values, Family decision, Family holiday, Child friendly, My wife has children.	1.6%
First Visit	Not been before.	1.4%
Convenience	Convenience, Easy, Easy transfer, No space on other flights, No time difference, Time of year, I am staying in the Alentejo, Went to Spain, Closeness to Spain.	1.2%

Source: Author's fieldwork.

It is possible to conclude that the Algarve region is chosen mainly because of the weather conditions, a good range of available accommodation choices, including one's own second residence or the second residence of a friend or relative, and the easy air access from the UK. As previously mentioned, these factors are determinant but might not be enough to differentiate the Algarve from other competitive destinations. In a context in which these conditions and facilities co-exist within an atmosphere that tourists really appreciate, with a strong accent on people's friendliness, scenery and time, and with a range of available local activities (namely sport activities as analysed further in this section), as well as particular aspects of gastronomy, might enable to support an attractive and simultaneously different image from the competitors.

The second block of qualitative data is focused on the identification of destinations that UK tourists take into consideration before deciding to travel to the Algarve. This analysis leads to the identification of the general Algarve competitive destinations. It is almost consensual between the four moments of the interviews, pre/post-visit, peak/off-peak visits, that the main competitive destinations for the Algarve are located in Spain, other regions of Portugal, and France. These three elected holiday destinations, when aggregated, represent respectively 37.5%, 40.0%, 43.7% and 35.9% of the alternative places to visit considered by UK tourists.

TABLE 6.8 – COMPETITIVE DESTINATIONS: PRE-VISIT

Category	Competitive Destinations Mentioned	% of Total
Spain (mainland)	Spain, Costa Blanca, Costa del Sol, Alicante, Barcelona, Madrid.	15.1%
Portugal	Lisbon, Lagos, Madeira, Alentejo, Bragança, Portimão, Portugal, Vila Real, Oporto.	11.4%
France	France, Nice, Toulon, Corsica.	11.0%
Italy	Italy, Milan, Sardinia, Sicily, Rome, Venice.	7.3%
America	Las Vegas, Florida, San Francisco, USA, New York, Miami.	7.0%
Balearic Islands	Balearics, Ibiza, Maiorca, Menorca, Balearic Islands, Ibiza.	6.3%
Others Europe	Amsterdam, Austria, Belgium, Europe, Germany, Sweden, Ukraine, Switzerland, Other EU.	6.3%
Others Mediterranean	Mediterranean, Croatia, Malta, Tunisia, Cyprus.	5.8%
Greece	Greece.	5.1%
Africa	Africa, South Africa, Marrakech, Egypt, Libya.	4.0%
Turkey	Turkey.	3.7%
Caribbean	Barbados, Caribbean, Antiqua, Bermuda, Cuba.	3.6%
Asia and Indian Ocean Islands	India, Maldives, Hong Kong, Middle East, China, Tokyo, Asia.	3.6%
Canary Islands	Canary Islands, Tenerife.	3.3%
Others worldwide	Far East, All Destination, Worldwide.	2.2%
Australasia	Australia, New Zealand.	1.8%
United Kingdom	Cornwall, England.	0.8%
South America	South America.	0.6%
Middle East	Dubai.	0.6%
Canada	Canada.	0.5%

Source: Author's fieldwork.

TABLE 6.9 – COMPETITIVE DESTINATIONS: POST-VISIT

Category	Competitive Destinations Mentioned	% of Total
Spain (mainland)	Spain, Marbella, Huelva, Isla Cristina, Alicante, Costa del Sol, Valencia, Punto Umbria, Jerez, Sevilla.	16.9%
France	France, South France, Nice, Cannes, Nice, Disneyland Paris, Bergerac.	11.8%
Portugal	Lisbon, Oporto, North Portugal, Póvoa do Varzim, Évora, Faro, Coimbra, Sines, Alentejo, Viana do Castelo, Braga, Alentejo, Portugal, Sagres, Cascais, Azores, Estoril, Fátima, Óbidos, Moita, Madeira.	11.3%
Greece	Greece, Greek Islands, Kos, Cephalonia, Corfu, Santorini, Rhodes, Athen.	8.4%
America	America, USA, New York, Florida, California, Las Vegas, Los Angeles, Hawaii, Orlando, Toronto, Boston.	6.9%
Italy	Italy, Sardinia, Sicily, Amalfi, Tuscanny, Rome, Veneza.	6.8%
Canary Islands	Canary Islands, Lanzarote, Tenerife, Fuerteventura.	5.0%
Others Europe	Austria, Berlin, Austria, Dublin, Ireland, Germany, Bulgaria, Poland, Norway, Sweden, Holland, Amsterdam, Netherlands.	4.9%
Balearic Islands	Maiorca, Menorca, Ibiza, Balearic Islands, Ibiza.	4.7%
Others Mediterranean	Malta, Crete, Cyprus, Croatia, Montenegro.	4.0%
Asia and Indian Ocean Islands	China, Japan, India, Russia, Hong Kong, Singapore, Sri Lanka, Malaysia, Tokyo, Maldives, Thailand, Bali.	3.4%
Australasia	Australia, New Zealand.	2.8%
Turkey	Turkey.	2.8%
Africa	South Africa, Morocco, Africa, Cape Verde, Tunisia, Egypt.	2.7%
Caribbean	Barbados, Bahamas, Antiqua, Saint Lucia, Dominican Republic, Caribbean, Cuba.	2.3%
Others Worldwide	Planet, Iceland, Costa Rica, Anywhere where there is Sun, Artica, Far East, Cruises, North, Open Minded - travel every year, To variety of locations, West Coast.	1.6%
United Kingdom	England, Cornwall, Scotland, Channel Islands, UK, Scunthorpe, Blackpool.	1.6%
Canada	Canada.	0.8%
South America	Argentina, Chile, Mexico, Peru, Brazil.	0.8%
Middle East	Dubai, Qatar.	0.5%

Source: Author's fieldwork.

As evident in the previous Tables 6.8 and 6.9, and in Tables 6.10 and 6.11 in the following pages, the Spanish references are mostly concentrated in the south of the mainland country, with emphasis on regions as the Costa del Sol or the Costa Blanca, or even more specific with references to localities such as Huelva, Isla Cristina, Punta Umbria, Marbella or Jerez (de la Frontera), all located near the Portuguese border and generally accessed by Faro International Airport. As a curiosity, Ryanair, the low-cost airline, identified on its website until 2010 Faro Airport as Faro/Huelva Airport. Other options located at a greater distance and in which the urban tourism is relevant, such as Valencia and Barcelona, were also mentioned by the tourists.

It is evident that between the three main competitive destinations, Spain is the most important one. The sun and sea destinations in the south of the Spanish mainland are dominant, but the presence of this country is stronger if, simultaneously, the two other Spanish regions cited by the tourists, namely the Balearic Islands (Mediterranean) and the Canary Islands (Atlantic), are considered. This is an aggregation that leads the presence of Spain as a concurrent destination to a minimum of 24.7% and maximum of 27.3% of the total considered options throughout the samples. About one in four alternative options to the Algarve were Spanish destinations.

The two other leading competitive regions are several regions of Portugal and France. Considering the Portuguese options mentioned, they represent along the pre/post-visit, peak/off-peak samples a quite constant parcel of respectively 11.4%, 11.3%, 11.5% and 11.8% of the alternative destinations considered by UK tourists. The regions considered are mostly situated in coastal areas, namely Cascais, Sines, and Póvoa do Varzim, among others, or the Atlantic islands of Madeira and Azores. There are references to the two main cities of Portugal – Lisbon and Oporto – a scenario whereby mainly the Lisbon choice also allows a coastal sun and sea use. Finally, a special attention to the several references to Fátima, the most important Catholic religious destination in Portugal.

With regards to France, its presence ranges between 11.0%, 11.8%, 14.2% and 8.5% respectively for the pre/post-visit, peak/off-peak samples, with the references essentially concentrated in the south Mediterranean areas, namely Nice, Cannes, Toulon or Corsica, despite the inclusion of some references to Paris and Disneyland, the last one being evidence of a family/children-friendly perspective.

Regardless of not being among the top three alternative destinations, it is evident from the constant references to Greece, particularly the Greek islands, plus several regions of Italy, that these places also belong to the Algarve's competitive framework. This is a global finding that supports the idea of the Algarve's positioning within the structure of sun and sea holiday destinations on the Mediterranean coast or Atlantic islands of the European Union.

Considering the relation between peak/off-peak season, Tables 6.10 and 6.11, it is possible to add three other geographical competitive perceptions.

TABLE 6.10 – COMPETITIVE DESTINATIONS: PEAK

Category	Competitive Destinations Mentioned	% of Total
Spain (mainland)	Spain, Valencia, Marbella, Huelva, Costa del Sol, Barcelona, Sevilla, Costa del Sol, Alicante, Madrid, Punta Umbria, Jerez.	18.0%
France	France, South of France, Cannes, Nice, Bergerac, Corsica.	14.2%
Portugal	Sagres, Northen Portugal, Madeira, Lagos, Évora, Cascais, Lisbon, Sines, Oporto, Fatima, Faro, Braga, Madeira, Azores, Alentejo, Coimbra, Póvoa do Varzim, Moita, Óbidos.	11.5%
Italy	Venice, Tuscany, Italy, Sicily, Sardinia, Rome, Venice, Rome.	7.1%
Greece	Greek Islands, Greece, Athens, Corfu, Rhodes, Kos.	6.5%
America	America, Orlando, Las Vegas, Florida, California, USA, New York, Hawaii.	5.7%
Balearic Islands	Balearic Islands, Balearics, Ibiza, Menorca, Mallorca.	5.4%
Others Europe	Europe, Ireland, Dublin, Austria, Germany, Switzerland, Holland, Berlin, Austria, Belgium, Bulgaria, Amsterdam, Others EU, Netherlands, Poland, Sweden, Malta.	5.3%
Asia and Indian Ocean Islands	Maldives, India, Russia, Singapure, China, Japan, Hong Kong, Thailand, Bali.	4.3%
Africa	South Africa, Africa, Cape Verde, Egypt, Morocco, Tunisia, Libya.	3.3%
Turkey	Turkey.	3.2%
Caribbean	Caribbean, Saint Lucia, Barbados, Bermuda, Antiqua, Dominican Republic, Cuba.	2.8%
Others Mediterranean	Malta, Cyprus, Croatia, Montenegro, Malta, Crete, Mediterranean.	2.6%
Australasia	New Zealand.	2.1%
Canary Islands	Canary Islands, Lanzarote, Tenerife.	2.5%
Others Worldwide	Far East, Costa Rica.	1.9%
United Kingdom	England, Cornwall, UK, Blackpool.	1.6%
South America	Brazil, Chile, Argentina, Peru.	1.0%
Middle East	Dubai.	0.7%
Canada	Canada.	0.3%

Source: Author's fieldwork.

There is a slight increase for long distance alternative West destinations in the off-peak season, namely the United States of America (e.g. references to New

York, Florida and California) and Caribbean (e.g. Bahamas, Barbados or Antigua - all with English as the official language), an option in which the tourism products and climate pattern of these regions might be more favourable. On the other end, is the slight decrease for long distance alternative East destinations such as Asia and the Indian Ocean Islands (e.g. Malaysia, Thailand and Maldives).

TABLE 6.11 – COMPETITIVE DESTINATIONS: OFF-PEAK

Category	Competitive Destinations Mentioned	% of Total
Spain (mainland)	Spain, Barcelona, Isla Cristina, Costa del Sol, Valencia.	15.6%
Portugal	Lisbon, Alentejo, Madeira, Lisbon, Oporto, Faro, North Portugal, Bragança, Vila Real, Estoril.	11.8%
France	France, South France, Corsica, Nice, Paris, Toulon.	8.5%
Greece	Greece, Corfu, Atenas, Santorini, Rhodes, Cefalonia.	8.0%
Italy	Italy, Amalfi, Sicily, Sardinia, Milão, Rome, Venice, Rome.	7.2%
America	America, USA, New York, Las Vegas, Florida, Miami, Los Angeles, San Francisco, Boston.	7.1%
Canary Islands	Canary Islands, Canaries, Lanzarote, Tenerife, Forteventura, Tenerife.	6.3%
Others Mediterranean	Cyprus, Malta, Croatia.	6.2%
Others Europe	Amsterdam, All of Europe, Europe, Iceland, Austria, Norway, Ukraine, Poland, Germany.	5.9%
Balearic Islands	Ibiza, Maiorca, Menorca, Balearic Isles.	5.4%
Caribbean	Caribbean, Bahamas, Cuba, Barbados, Antiqua.	3.1%
Australasia	Australia, New Zealand.	3.1%
Turkey	Turkey.	2.6%
Africa	Africa, South Africa, Morocco, Egypt.	2.6%
Asia and Indian Ocean Islands	Singapore, Malaysia, Tokyo, Thailand, Sri Lanka, China, Thailand, India.	1.9%
United Kingdom	Channel Islands, UK, Scotland, Scunthorpe.	1.3%
Canada	Canada.	1.5%
Others Worldwide	Far East, Worldwide, Anywhere Where There is Sun, Open Minded - travel every year.	0.9%
South America	South America, Mexico	0.7%
Middle East	Qatar, Dubai.	0.3%

Source: Author's fieldwork.

However, the most noteworthy change between peak/off-peak seasons happens on two of the previously identified main competitive regions - France and Spain - being Portugal relatively constant throughout the samples as referred.

France is the leading competitor that reveals the biggest decrease from peak to off-peak alternative destinations considered, decreasing from 14.2% in the peak to 8.5% in the off-peak, a reduction of 5.7 percentage points between the two seasons. The destinations pointed out by the UK tourists do not change much (e.g. Paris, Cannes, Nice and Corsica). It is the number of times they are referred to that clearly declines.

Spain's (mainland) importance decreases 2.4 percentage points from peak to off-peak season but a reverse behaviour is quite evident in the Canary Islands alternative, whose relative choice among tourist's destinations increases from 2.5% in the peak season to 6.3% in the off-peak season, more than duplicating its importance. This is an important strategic finding for the Algarve competitive destinations throughout the year. It is also empirically relevant by its consistence with the findings of Peligros et al. (2014) about the differential behaviour of tourist demand in the Spanish autonomous communities between 1997 and 2014, in which the Canary Islands are the ones with the lowest seasonal rates.

As a final note about Algarve's competitive destinations, and only focusing on countries and not regions, it can be underlined that the current framework based on UK tourists' alternatives to the Algarve allows the identification of a total of 57 countries within the database, an evident demonstration of the globalization of the tourism sector and, simultaneously, of the UK as a market with global travel patterns.

The questions about the websites that UK tourists consult to get information about the Algarve are analysed next. This analysis is even more important considering that, as previously identified in Section 6.2.1, the Internet represents from 25.1% to 27.7% of the total sources of information used by these tourists.

Generally, the main tendency that Tables 6.12, 6.13, 6.14 and 6.15 highlight is the use of four websites: Flybe, TripAdvisor, a group composed by several owners' vacation rental websites (e.g. Owners Direct) and, finally, a group of specific hotel websites of the Algarve.

The Flybe website is an option with 21.3%, 16.9%, 17.4% and 19.7% of the total choices respectively for the pre/post-visit, peak/off-peak samples. This is an expected result since it is this airline that assures direct flights between Exeter and Faro from January to October, a result that emphasizes the importance of analysing the information about the Algarve included on the Flybe website or linked to it.

Further on, the respondents seem to be interested in searching for practical information about the Algarve, being TripAdvisor the next website most consulted, correspondingly 10.7%, 13.4%, 12.5% and 12.8% for the pre/post-visit, peak/off-peak samples. This is a website that offers extra information about a destination's overall quality or specific aspects such as accommodation options and attractions, among others. With a share always superior to 10% TripAdvisor should be carefully monitored by Algarve's tourist planners and managers, as is already done by several private accommodation companies that regularly post answers to visitors' comments when they feel they are unfair. The same applies to comments acknowledging a good classification.

TABLE 6.12 – WEBSITES USED TO GET INFORMATION ABOUT THE ALGARVE: PRE-VISIT

Category	Websites Mentioned	% of Total
Others	Yahoo, Birdwatching, www.saobrasuncovered.com, Moto Clube de Faro, www.arquscambine, Wanna, Browns, Rusailing, Teletext, RCI, The real algarve, Wikipedia, Portland, Tootstoo, Right moves, Just use search engine, Tavira, Avanti, Sunmaster, Bookers, Escape.	36.0%
Flybe	Flybe.	21.3%
TripAdvisor	TripAdvisor.	10.7%
Owners Vacation Rentals	Ownersdirect.com.	10.7%
Google	Google.	8.4%
Algarve Agencies and Information	Algarve.com, Algarve Agency, Algarvetravel.com, Algarve resident group, Local tourist info pages.	6.6%
Travel Republic	Travel Republic.	2.5%
Tour Operators	Thomas Cook, Thompson.	1.6%
Golf	Golf brochures, Golf Portugal.	1.6%
Weather	BBC Weather	0.6%

Source: Author's fieldwork.

TABLE 6.13 – WEBSITES USED TO GET INFORMATION ABOUT THE ALGARVE: POST-VISIT

Category	Websites Mentioned	% of Total
Flybe	Flybe.com.	16.9%
TripAdvisor	TripAdvisor.	13.4%
Owners Vacation Rentals	Owners Direct.com, Owners Abroad, Villa Owners, Villa Renters.	10.7%
Hotel Websites	Hilton, Pestana, Sheraton, Ocean Villas, Vale do Lobo.com, Hotel.com, Arrifana surf lodge, Oasis Parque, Martinhal, Elegant Resorts, , Sunartasvillas.com, Vale do Lobo, www.quintaessential, Castoffaro.com, Quinta da Bica, Petchey, Vila Galé, Vila Vita Park, Carvoeiro.com, VillaParade, Villa Centre, Villa Vita hotel, Villa Joya.	9.4%
Google	Google, Google Earth.	9.6%
Others	Ebookers, Escape, Just use search engine, Moto Clube de Faro, RCI, Right moves, Rusailing, www.saobrasuncovered.com, Sunmaster, Tavira, Teletext, The real Algarve, Tootstoo, Wanna surf, Wikipedia, www.arquscambine, Birdwatching, Browns, Yahoo, Ask, Avanti, Car Hire 3000, Arguscarhire, Nacional Hire, Smartvillas, Farotransfers.com, Homes.com.	6.8%
Algarve Agencies and Information	Algarve solutions, Algarve tourist information, Algarve website, Algarve.com, Aljezur.com, Alpharooms, Ask, www.algarveway.com, Universidade do Algarve, Extreme Algarve, Simply Lagos.com, Farotouristwebsite.	5.1%
Expedia	Expedia.	4.1%
Tour Operators	First Choice, Thomas Cook, Thompson, Thomson Holidays.	3.8%
Airport and Other Airlines Websites.	Low Cost, Exeter airport, Faro Airport, Monarch, Cheap flights.com, Easyjet, Algarve airports centre, Easyjet.	5.2%
Tourist Websites	Tourist info, Travel supermarket, Travel Website, 100 best golf courses in Portugal, Aggro-info, Babyfriendlybolthotels, Algarve golf, Visitalgarve.com, Visitportugal.com.	4.8%
Holiday and Discount Websites	Holiday Lettings, Holiday on the beach, Holiday rentals, Holidays.com, www.holiday-rentals.com, Directline Holidays, Holiday Lettings, Lastminute.com, Algarve Rentals.	4.2%
Travel Republic	Travel Republic.	2.5%
Booking	Booking.com.	1.4%
Weather	BBC Weather, BBC Weather Forecast, BBC, Weather.	1.1%
Facebook	Facebook.	0.5%
Lonely Planet	Lonely Planet.	0.5%

Source: Author's fieldwork.

Another website domain that is relevant is the group that aggregates several owners' vacation rentals as Owners Direct or Owners Abroad, which are specialized in the rental market of villas and private apartments directly from the owners (through a website organization), representing 10.7%, 10.7%, 11.0% and 7.7% of website options respectively in pre/post-visit, peak/off-peak samples. Besides, when considering all these websites globally, the result confirms the importance of the housing market and second residences in the Algarve, as previously detected in this section about the visit characterization and decisive factors to visit the Algarve.

TABLE 6.14 – WEBSITES USED TO GET INFORMATION ABOUT THE ALGARVE: PEAK

Category	Websites Mentioned	% of Total
Flybe	Flybe.com.	17.4%
Algarve Websites	Algarve airports centre, Algarve tourist information, Algarve.com, algarvetravel.com, Aljezur.com, Carvoeiro.com, Local airport, Vale do Lobo.com, Faro airport, Algarve golf, Extreme Algarve, Algarve rentals, Algarve agency, University of Algarve, Moto Clube de Faro, Local tourist info pages, Visit Algarve, www.algarveway.com, Tavira, The real Algarve, Affinity villas, Castoffaro.com, www.simplylagos.com, Simply Lagos.com.	12.9%
TripAdvisor	TripAdvisor.	12.5%
Owners Vacation Rentals	Owners Direct.com, Owners abroad, Homeaway.com.	11.0%
Others	Travel Supermarket, moneysaverexpert.com, Wikipedia, Argus Car Hire , Yahoo, Aggro-info, Arguscarhire, Ask, Car hire , Escape, Naturist sites , Right moves, Sunmaster, The vela agency, Surfing websites, BA, Travel website, BBC.	9.8%
Google	Google.	9.8%
Hotel Websites	Hotel website, Browns, Algarve resident group, Martinhal, Vila Galé, Oasis Parque, James villas, Arrifana surf lodge, Hotels.com, Ocean Villas, Quinta da Bica, Homes.com, Sunartasvillas.com, Alpharooms.com, Villa Apartment website, Villa Centre, Villa Plus, villaparade.com, Villas direct, Baby friendly bolt holes.	8.2%
Tour Operators Websites	Thomson, Thomson holidays, Thomas cook, Travel republic, Lonely Planet, Tootstoo.	7.4%
Holiday and Discount Websites	Lastminute.com, Holiday direct, Holiday Lettings, Holiday on the beach, Holiday Rentals, Holidays.com, Cottage direct, Cheapflights.com, Direct Holidays, www.holiday-rentals.com.	5.5%
Expedia	Expedia.	3.1%
Other Airlines Websites	EasyJet, Airline Monarch.	1.1%
Facebook	Facebook.com.	0.8%
Weather	BBC weather forecast.	0.5%

Source: Author's fieldwork.

Interesting is the fact that 8.2% to 11.1% of the UK tourists identified a precise hotel website, with the higher percentage in the off-peak sample. Assuming that this reference identifies their accommodation option, this result may reveal a close connection with the destination facility itself. If linked with the fact that on average these tourists have known the Algarve for about 18 years, as noticed on the visit characterization, it is possible to consider at least as a hypothesis that this segment of tourists search information in the hotel websites directly, bypassing general information about the region that they already know. If this happens, then these hotels, as sources of information, should be carefully monitored by Algarve's destination planners and managers in an effort to share common regional information on these websites, so that they transmit a consensual and actualized image of the destination besides the accommodation facilities themselves.

TABLE 6.15 – WEBSITES USED TO GET INFORMATION ABOUT THE ALGARVE: OFF-PEAK

Category	Websites Mentioned	% of Total
Flybe	Flybe.com.	19.7%
TripAdviser	TripAdviser.	12.8%
Hotel Websites	Hotel website, Browns, Algarve resident group, Martinhal website, Vila Galé, Village Oasis Parque, James villas, Arrifana surf lodge, Hotels.com, Ocean villas, Quinta da Bica, Homes.com, Sunartasvillas.com, Alpha rooms, Alphavoom.com, Villa apartment website, Villa Centre, Villa plus, villaparade.com, Villas direct, Baby friendly bolt holes.	11.1%
Others	Rusailing, São Brás Uncovered, Wanna surf, Yahoo, Birdwatching, Travel suke, Travel supermarket, Avanti, Deal citecum, Directline Holidays, Ebookers, Last minute, Economy car hire, Low Cost, Car Hire 3000, Last minute.com, Nacional Hire.	10.2%
Google	Google.	9.8%
Owners Vacation Rentals	Owners abroad, Owners direct.com,Villa owners, Owners direct.com.	7.7%
Tour Operators	Thomas Cook, Travel Republic, Thompson, Travel Republic, Thompson, First Choice, Holiday rentals, Alistair Sawday, Monarch, Petchey.	7.3%
Algarve Websites	Algarve solutions, Algarve website, Carvoeiro.com, Airport, Portugal Airport, Portugal Direct, Portugal.com, Tourist info, Tourist information, Vale do Lobo, Albufeira.com, Farotransfers.com, General Portuguese, General use, São Brás, Faro tourist website.	7.3%
Expedia	Expedia.	3.4%
Other Airline Websites	EasyJet.	2.1%
Teletex	Teletex	1.7%
Weather	Weather, BBC weather website, BBC weather website.	1.7%
Golfe	Golf brochures, 100 best golf courses in Portugal.	1.7%
Booking.com	Booking.com.	1.3%
Holiday and Discount Websites	Holiday Lettings.	1.3%
Exeter Airport	Exeter airport.	0.9%

Source: Author´s fieldwork.

Despite being a residual percentage, it is curious that the BBC, or specifically the BBC weather website, is present in all samples and is more valued by the off-peak tourists.

The next group of analysis is focused on the Algarve´s destination image perceptions from UK tourists, the called stereotypical image, summarized in Tables 6.16, 6.17, 6.18 and 6.19 respectively for the pre/post-visit and peak/off-peak seasons. This is an empirical stage based on the analysis of three possible keywords the respondents were invited to associate with the Algarve in the questionnaire. The purpose of this approach is to identify and reduce the main associations of the Algarve to a smaller and manageable image concept.

Globally, it is possible to identify the existence of a dominant perspective along the keywords of the four samples, which emphasize the weather conditions and the atmosphere. A second group aggregate categories as hospitality, gastronomy, beach and sea and sand and, finally, a third set includes a more extended list gathering the golf sport, natural beauty, activities, family oriented and price and value. After this there are six other groups of identified keyword categories with a residual or intermittent presence.

The results demonstrate that the weather conditions are a key association of the Algarve's image, a result that consolidates the similar findings obtained about the decisive factors to visit the Algarve. In this stereotypical image category it is recurrent to find comments such as "easy-going climate", "lovely weather", "blue sky", "sunny", "lots of sunshine" or "windy", among others, which, when combined, make the weather conditions number references very constant along the samples, respectively 33.9%, 30.3%, 31.3% and 32.1% for the pre/post-visit and peak/off-peak seasons. This is a characteristic impossible to ignore in the Algarve's promotion but, as expressed before, it doesn't promote a unique identity, since it is shared with other competitive destinations, namely the south of Spain and France.

The second most relevant image reference is the atmosphere, an item that signifies respectively 12.7%, 12.4%, 13.0% and 16.0% in the pre/post-visit and peak/off-peak samples. Such as the weather conditions, the general tendency is largely positive, being common to find comments such as "pleasant", "quietness", "stress-free", "gorgeous", "happy" or "freedom" under atmosphere category, with no negative references being referred. "Safe" is one of the keywords elected, with a slightly noted presence, a positive output since the safe feeling is usually somehow imperceptible and only stressed when is negative (unsafe). As an example, during the analysis of the decisive factors to visit the Algarve, in the pre-visit sample, Table 6.4, one of the nominated factors was the “instability of other destinations” and never the “stability of the Algarve destination”.

Weather conditions and atmosphere, always superior to 10% of the total keywords suggested, constitutes two important components of the Algarve‘s image, but they must be complemented with other (positive) feelings and perceptions in order to promote a complete and attractive image of the destination. These other feelings and perceptions could be connected with the hospitality, gastronomy and, as might be expected, since it is the main tourism product of the region, the beach plus the sea and sand.

The hospitality represents 8.1%, 10.1%, 8.8% and 10.8% of the total stereotypical image references respectively in the pre/post-visit and peak/off-peak samples. Its allusions are mainly focused on residents attitudes to day-to-day living and/or specifically when interacting with tourists. These contacts, particularly for UK, started in the 1960s, from which can be assumed that nowadays at least two local generations are tourism related. With tourism being the most important economic activity in the region, and the UK the most important foreign market, as stressed in Chapter 4, the positive references found under this social and cultural image stereotype are a good insight to the importance of not exceeding the tourism carrying capacity of the region. Repeated comments such as “lovely people”, “welcoming”, “friendship” or “smiles” can only be present in a genuinely hospitable bond that benefits both actors in the tourism system (the tourists and the residents).

Another category is highlighted by the UK tourists: gastronomy. The tourists interviewed revealed a general tendency of having a very positive perspective of the Algarve’s gastronomy, aggregating 10.4%, 8.7%, 10.2% and 9.3% of total mentions respectively in the pre/post-visit and peak/off-peak samples. References to “fish”, “sardines”, “food BBQ”, “seafood”, “medronho[30]” or “vinho verde[31]” are common between the UK tourists and add a particular value to the

[30] Known as “firewater” to non-Portuguese speakers, it’s a strong spirit obtained from the fruit of the strawberry tree that grows wild on the poor soils of the rural inner Algarve.

[31] A "young wine", red, white or rosé, lightly effervescent, meant to be consumed within a year of bottling.

visit experience through a distinctive image of the Algarve in terms of gastronomy, enhancing a unique perspective of the destination, critical in the globalized competitive framework.

The pleasant atmosphere feelings could be explored in combination with the gastronomy, hospitality and family oriented destination image (a perception present in all samples), in order to develop an integrated product regarding the gastronomy and the cultural tendency of the Latin's enthusiasm to share love and happiness during the meals.

TABLE 6.16 – ALGARVE DESTINATION STEREOTYPICAL IMAGE: PRE-VISIT

Category	Algarve Destination Keywords	% of Total
Weather Conditions	A nice weather, Good climate, Hot, Sun, Sunny, Sunshine, Warm, Weather, Warm, Winter Sun, Tropical, Good climate.	33.9%
Atmosphere	Relax, Relaxation, Relaxing, Quiet, Peace and Quiet, Quietness, Peace, Pleasant, Peaceful, People, Pleasant, Leisure, Happy, Happiness, Holiday, Fun, Cheering, Enjoyment, Good.	12.7%
Gastronomy	Food, Fish, Sardines, Good food, Port wine, Excellent wine, Sangria, Sardine Paste, Vinho verde, Wine, Drink, Shellfish.	10.4%
Sea and Sand	Sea, Sand, Sandy.	8.7%
Hospitality	Friendliness, Friendly, Nice people, Good people, Lovely people, Friends/Family, Friendship, People, Pleasant People, Hospitable.	8.1%
Beach	Beach, Good beaches.	7.4%
Natural Beauty	Beautiful, Clean, Countryside, Beauty, Beauty Western Algarve, Coast, Natural beauty, Natural resources, Natural western Algarve, Nature, New, Scenery, Unspoilt only western Algarve.	4.6%
Convenience	Easy to reach, Short flight, Comfortable, Convenience, Good Time, Good hotels away from coast, Holidays, Places, First visit, Home, Proximity to Spain.	4.3%
Golf Sport	Golf.	4.3%
Activities	Sky, Surf, Tennis, Port, Sailing, Activities, Sex, Zoomarine.	2.6%
Family Oriented	Family.	0.9%
Cultural Experience	Cultural, Portugal.	0.8%
Price and Value	Value, Good value.	0.8%
Overdeveloped	Booze, Fear.	0.3%
Infrastructures	Port	0.2%

Source: Author's fieldwork.

TABLE 6.17 – ALGARVE DESTINATION STEREOTYPICAL IMAGE: POST-VISIT

Category	Algarve Destination Keywords	% of Total
Weather Conditions	Climate, Good climate, Sunny, Sunshine, Sun/Warmth, Good weather, Warmth, Windy, Easy going climate, Lovely weather, Excellent climate, Super weather, Dry, Temperature, Great weather, Blue skies, Blue sky, Lots of sunshine, Heat, Brilliant, Traditional.	30.3%
Atmosphere	Relaxation, Relax, Relaxing, Relaxed style of living, Pretty, Quiet, Good, Peaceful, Quietness, Peace, Pleasant, Nice, Tranquillity, Arousing, Serene, Restful, Stress free, Slow pace, Calm, Safe, Relay, Secluded, Elegant, Unpretentious, Smells, Buzzy, Gorgeous, Great, Epic, Paradise, Freedom, Chilled, Regenerating.	12.4%
Hospitality	Friendliness, Friendly, Friendly people, Nice people, Welcoming, Portuguese people, Hospitable, Kindness, Hospitality, Lovely friendly people, Helpful, Polite, Smiles.	10.1%
Beach	Beach, Good beach, Clean beaches, Empty beaches.	8.7%
Gastronomy	Food, Fish, Food BBQ, Good food, Wine, Great food, Food, Medronho, Port, Vinho verde, Sangria, Piri-Piri chicken, Super Bock, Bear, Great food, Port wine, Good eating, Sardines, Nice food, Fish and seafood, Seafood, Outside eating, Alcohol.	8.7%
Sea and Sand	Sea, Sand, Sandy Beach, Sandy, Salt, Waves, Seaside.	6.4%
Golf Sport	Golf, Golf club, Golf courses, Good golf, Excellent golf courses.	4.7%
Natural Beauty	Beautiful, Beauty, Sea, Spectacular coastline, Mountains, Coast line, Hills, Scenery, Countryside, Love west coast, Natural, Figs, Flowers, Wildlife, Windmills, Almonds, Scenic, Vegetation, Unspooling countryside, Natural Attractions.	3.7%
Price and Value	Expensive, Cheap Prices, Value for money, Comfort, Good value, Inexpensive.	3.2%
Others	Old Fashioned, Too many English, Classy, Space, Not built up, Nightlife, Rugged.	2.3%
Family Oriented	Family, Second home, Portugal, Family friendly, Holiday resort, Holiday, Brother, Happy holidays with family, Home, Homely feel, Parents, Summer, Child friendly.	2.1%
Activities	Outdoor activities, Water parks, Boats, Walks, Sex, Tennis, Surf, Swimming, Aquashow, Bowling, Dart bikes.	1.9%
Clean Environment	Clean, Cleanliness.	1.3%
Cultural Experience	Culture, UNESCO, Sagres, Portugal, History.	1.3%
Overdeveloped	Overdeveloped, Some mad drivers, Mosquitos, Bad roads, Laid back.	1.2%
Infrastructures	Pool, Restaurants, Swimming pool, Port, Shopping, Markets, Pool, Villas, Bars, Bridge, Airport.	1.1%
Convenience	Not a long flight, Convenience.	0.6%

Source: Author's fieldwork.

As expected, due the regional specialization in the sun and sea tourism product, the stereotypical image reveals an intensive presence of items connected with beach plus sea and sand. The first one – beach – is more linked with the extensive presence of this natural attraction in the Algarve, with constant references to “beach” and markedly positive, with comments like “beautiful beaches”, “clean beaches” or “great beaches”. The second one – sea and sand – emphasises specific characteristics of the Algarve coastline, namely references to “sandy”, “waves” and “salt”, a possible unique mix of the Atlantic seawaters known by its “waves” with the peaceful “sandy” and “salt” seawaters of the west limit of the Mediterranean. If added, these two categories represents 16.1%, 15.1%, 16.6% and 13.9% of the total items referred by the tourists, respectively in the pre/post-visit and peak/off-peak samples, with the maximum value occurring in the peak season and minimum obtained in the off-peak, as expected.

Cumulatively, if into the previous categories of beach, sea and sand, is added the category of the natural beauty reported by the tourists along all samples, in which perceptions as “unspoilt”, “nature”, “love west coast” are commonly presented, then it is possible to reinforce the global perception of the Algarve as a typical and quite pleasant oriented sun and sea holiday destination

This perception occurs in a region where the seaside and the coastline are frequently praised, despite some references about being “overdeveloped” that were integrated in the category of others. This relation should be carefully managed by the regional tourism planners, since the coastline is, in spite of everything, only a small part of the Algarve territory, (about one third), but is responsible for almost all the tourism facilities and main attractions.

TABLE 6.18 – ALGARVE DESTINATION STEREOTYPICAL IMAGE: PEAK

Category	Algarve Destination Keywords	% of Total
Weather Conditions	A nice weather, Beautiful weather, Blue sky, Climate, Good climate, Good weather, Heat, Hot, Hot and sunny, Sun, Sunny, Sunshine, Temperature, Warm, Warm and sunny, Weather, Windy, Blue Sky, Chilled, Summer, Atmospheric, Rain.	31.3%
Atmosphere	Fun, Enjoyment, Enjoyable, Fantastic, Fun, Happy, Happy holidays with family, Gorgeous, Great, Nice, Pleasant, Atmosphere, Dream, Good time, Lively, Brillant, Freedom, Chering, Good time, Leasury, Smells, Attrative, Traditional, Holiday, Peace, Peaceful, Pleasant, Relaxation, Relaxing, Peacefull, Tranquility, Safe, Relax, Quiet, Secluded.	13.0%
Gastronomy	Fish, Food, Sardines, Good food, Great food, Good fresh food, Seafood, Restaurants, Fish and seafood, Piri Piri Chicken, Food BBQ, Wine, Good Food, Piri-Piri, Port / Wine, Fish, Chicken piripiri, Superbock, Markets, Outside eating, Vinho verde, Medronho.	10.2%
Beach	Beach, Great beaches, Clean beach, Beautiful beaches, Beaches, Beautiful coast, Excellent beaches, Waves, Empty beaches.	9.8%
Hospitality	Friendliness, Friendly, Nice people, People, Friendly, Welcoming, Hospitable, Smiles.	8.8%
Sea and Sand	Sea, Sand.	6.8%
Natural Beauty	Beautiful, Beautiful sea, Beauty, Beauty - Western Algarve, Brilliant, Classy, Heaven, Leisure, New, Pretty, Natural, Natural attractions, Natural western Algarve, Natural, Mountains, Country, Natural beauty, Scenery, Hills, Natural, Love west coast, Nature, Windmills, Unspoild countryside in west coast.	5.2%
Golf Sport	Golf.	3.9%
Overdeveloped	Old fashioned, Overdeveloped, Laid back, Some mad drivers, Not built up, Bad roads, Mosquitos.	2.3%
Activities	Outdoor activities, Surf, Activities, Shopping, Tennis, Swimming, Sailing, Walks, Sex, Aquashow, Zoomarine, Water parks.	2.3%
Family Oriented	Family, Home, Second home.	1.4%
Convenience	Easy going, Convenient, Short flight, Standard, Comfortable, Easy to reach.	1.1%
Cultural Experience	Culture, Unesco, Portugal, Sagres, Atlantic.	1.3%
Clean Environment	Clean.	1.2%
Price and Value	Expensive, Good value, Cheap prices.	0.9%
Infrastructures	Pool, Holiday resort, Airport, Port, Bridge, Bars.	0.5%

Source: Author's fieldwork.

TABLE 6.19 – ALGARVE DESTINATION STEREOTYPICAL IMAGE: OFF-PEAK

Category	Algarve Destination Keywords	% of Total
Weather Conditions	Good climate, Good weather, Easy going climate, Excellent climate, Hot, Hot summer, Sun, Sun, Sea, Sunny, Sunshine, Warm, Weather, Windy, Sunshine, Sunny, Super weather, Dry, Lovely weather, Blue sky.	32.1%
Atmosphere	Enjoyment, Paradise, Easy, Heaven, Pleasant, Good, Arousing, Fabulous, Gorgeous, Pleasant, Happiness, Happy, Nice, Great, General ambience, Party, Elegant, Patient, Lost, Busy, Regenerating, Homely feel, Polite, Fun, Relaxing, Safe, Quiet, Restful, Pleasant, Calm, Relaxed, Quietness, Quiet, Peace and quiet, Pleasant, Slow pace, Peaceful, Stress free, Relay, Buzzy.	16.0%
Hospitality	Friendliness, Friendly, Friendly people, Friends, Nice people, Hospitality, Friendly, Pleasant people, Nice people, Helpful, Lovely people, Very friendly, Welcoming, Hospitable, Welcoming, Good people, Child friendly, Home, Brother.	10.8%
Gastronomy	Good food, Sardines, Food, Wine, Fish, Excellent wine, Nice food, Shellfish culture, Sangria, Drink, Vinho verde, Seafood, Restaurants, Beer, Port wine.	9.3%
Beach	Beach, Beaches, Lovely beach, Good beaches, Alvor beach, Beach bars, Lovely beaches, Clean beaches.	7.7%
Sea and Sand	Sea, Seaside, Coastline, Sand, Sandy.	6.2%
Golf Sport	Golf, Golf club, Golf courses, Excellent golf courses.	5.3%
Natural Beauty	Natural resources, Natural beauty, Natural, Scenic, Nature, Scenery, Space, Countryside, Natural, Mountains, Vegetation, Places, Wildlife, Scenery, Spectacular coastline, Beautiful, Blue sky, Flowers.	3.2%
Activities	Surf, Pools, Sex, Bowling, Football, Tennis, Boats, Dart bikes.	1.8%
Convenience	Convenient, Accessible, Proximity to Spain, Close, Comfortable, Easy, Not a long flight, Nice villa, Nice resorts, Good hotels away from coast, Good hotels.	1.6%
Others	Holiday, First visit, Too many English, Rugged, Old people.	1.5%
Price and value	Expensive, Inexpensive, Value for money, Value.	1.2%
Clean Environment	Clean.	1.1%
Cultural Experience	Heritage, Culture, Traditional, History, Traditional, Epic, Portugal.	1.1%
Infrastructures	Pool, Port.	0.2%
Overdeveloped	Laid back, Booze, Fear.	0.5%
Family Oriented	Family.	0.4%

Source: Author's fieldwork.

Regarding the other keywords of the Algarve's image, it is possible to find regular references to the golf sport, particularly evident in the post-visit sample with references to "good golf", "golf club" or "excellent golf courses", among others.

The golf sport achieves its maximum presence in the off-peak sample, 5.3%, a figure consistent with the seasonal patterns of this sport in the Algarve, which attains one of its highest levels of demand in the October/November months (Candeias, 2012).

The category named activities is another particular stereotypical image of the region. Besides the separated golf category, there are several references to outdoor activities such as "surf", "sailing", "tennis", "bikes", "tours and walks", among others. Another attention is given to the waterparks and theme parks included in this category (as tourism animation activities), particularly in the peak season.

Benefiting from the peak season "warm and sunny" and off-peak "lovely weather", a mix of these outdoor activities might be further explored in a context strengthened by the positive atmosphere and the friendliness/hospitality of the region. Regarding walking, touring or other nature-based activities, the countryside of the Algarve is a "new" exploitable territory, which is considered "unspoilt" by UK tourists, a reference consistent with the previous 2007-2013 Algarve regional strategic development orientation as expressed in CCDRA (2006).

Concerning the stereotypical image, some other notes can be expressed. Firstly, the negative references included in the other category should be carefully noted, with an emphasis on planning, transport infrastructure and social behaviour, which includes perceptions such as "overdeveloped", "some mad drivers" or "bad roads". Secondly, the constant diminutive presence of the cultural experience throughout the samples, revealed a possible weakness of the destination's promotion identity. Thirdly, the price and value category differences between the pre/post-visit samples, being the first less extended – 0.8% – but absolutely positive with references to "value" and "good value", and the second more extended – 3.2% – confirming the "good value", "value for money" or "inexpensive", but also including opposite perspectives as "expensive", a dichotomous perception that should be carefully monitored in future researches.

The free elicitation data also reveals two other particular gaps between the peak/off-peak perceptions, which are relevant because they occur in dominant categories as the atmosphere and hospitality. There was an increase in these two categories in the off-peak sample, respectively 3 and 2 percentage points. The regional planners should take particular attention to identify the reasons for the decreasing in the peak season, where previous notes about planning, transport infrastructure and social behaviour should be taken into consideration.

Globally, it can be considered that these groups of findings about a stereotypical image are consistent with the decisive factors previously reported, which offers a good perspective about the fulfilment of expectations for an Algarve visit. The possible main problem arises from the desired distinctiveness amongst the competitive destinations. Besides some specific mentions in the gastronomy as the quoted “medronho” or “vinho verde”, and in the cultural experience, the central mention to Sagres, it is difficult to recognize throughout the several categories a group of references that could express the uniqueness of the Algarve and could act as an element of differentiation and competitiveness.

These components about visitors’ travel behaviour and stereotypical images of the Algarve act as an interesting exercise in obtaining important inputs to the contents of the model of analysis for tourism destination image, confirming the attributes listed in the structured part of the questionnaire and highlighting the feelings regarding the Algarve.

Finally, already knowing the decisive factors of travel, destinations in competition with the Algarve, the websites used to get information about the region and the main perceptions of the Algarve’s stereotypical image, the present analysis finishes off with the identification of the accommodation place choices of these UK tourists inside the Algarve territory as shown in Tables 6.20, 6.21, 6.22 and 6.23.

There are four places that correspond to four Algarve municipalities that are clearly in evidence, being always amongst the main options of the tourists. These are Loulé, Albufeira, Lagoa and Lagos which, if added together, represent from

60.6% (off-peak) to 66.2% (pre-visit) of the total accommodation place options, a figure consistent with the general tourism demand data for the Algarve, since in 2012 these four municipalities' represented 70.8% of the total overnights in the region (Statistics Portugal, 2014).

TABLE 6.20 – ALGARVE PLACE PREFERENCES: PRE-VISIT

Category	Places Mentioned	% of Total
Loulé	Loulé, Quinta do Lago, Vilamoura, Praia da Falésia, Quarteira, Monte João Preto, Almancil, Vale do Lobo.	25.0%
Albufeira	Albufeira, Near Albufeira, Pine Cliffs, Vale de Parra.	14.7%
Lagoa	Lagoa, Luz, Olhos de Água, Praia da Rocha, Cartaxo, Vale de Pinta.	14.0%
Lagos	Lagos, Bensafrim.	12.5%
Faro	Faro, Faro/Boliqueime, Estoi, Moncarapacho, Santa Bárbara, Monte Cana.	8.1%
Sagres	Sagres, Budens, Salema, Vale da Telha.	7.4%
Tavira	Tavira.	3.7%
Ferragudo	Ferragudo.	3.7%
Armação de Pera	Armação de Pera, Vila Vita Park.	2.9%
Monte Gordo	Monte Gordo, Altura.	2.9%
Olhão	Quelfes, Olhão, Fuzeta.	2.2%
Others	Castelo, Algoz.	2.2%
São Brás de Alportel	São Brás.	0.7%

Source: Author's Fieldwork.

There is, as expected, an emphasis on references to coastal resorts and cities, mentioning places such as Vilamoura, Quinta do Lago and Vale do Lobo, all included in the Loulé municipality and among the oldest and best-known destinations in the Algarve. Another obvious reference is to Albufeira, a typical UK destination in the Algarve, a very small municipality that is almost completely specializes in tourist economic activity.

TABLE 6.21 – ALGARVE PLACE PREFERENCES: POST-VISIT

Category	Places Mentioned	% of Total
Loulé	Vilamoura, Praia da Falésia, Quarteira, Monte João Preto, Almancil, Loulé, Dunas Douradas, Boliqueime, Alfontes, Salir, Almancil, Julia's Beach.	20.7%
Albufeira	Albufeira, Near Albufeira, Pine Cliffs, Vale de Parra, Paderne.	16.3%
Lagos	Lagos, Bensafrim.	13.6%
Portimão	Alvor, Alvor e Tavira, Alvor, Praia da Rocha, Vilamoura, Alvor/Praia da Rocha/Vilamoura.	11.2%
Lagoa	Lagos.	10.5%
Faro	Faro, Santa Bárbara de Nexe, Armona Island, Azinheiro.	6.4%
Sagres	Sagres, Arrifana, Martinhal, Sagres, Fonte do Bispo, Aljezur, Burgau, Budens, Salema.	5.1%
Tavira	Santo Estevão, Tavira, Cabanas.	4.8%
Olhão	Near Olhão, Olhão, Fuseta, Quelfes, Ria Formosa, Moncarapacho.	2.8%
Monchique	Monchique, Marmelete, Caldas de Monchique.	2.0%
Silves	Silves, Alcantarilha, Armação de Pera, Pera.	2.0%
Others	Almádena, Huelva, São Romão, Barco, Cascais, Historical Centre.	1.7%
Monte Gordo	Monte Gordo.	1.7%
São Brás de Alportel	São Brás de Alportel.	0.6%
S.B.Messines	S.B. Messines.	0.3%
Castro Marim	Castro Marim.	0.3%

Source: Author's fieldwork.

The analysis of peak/off-peak samples maintains the general tendency but reveals some particular differences. Albufeira reinforces its leadership, perhaps due to the lowest prices for accommodation during winter. However, there is an increase in choosing places in small municipalities and less orientated to the sun and sea product, as in the case of Tavira, Silves and Vila Real de Santo António.

It might just be a coincidence, but these three places or municipalities are the only ones with navigable rivers in the Algarve, respectively the rivers Gilão, Arade and Guadiana. The last one defines the border between Portugal and Spain and is an international reference for the recreational sailing community.

Table 6.22 – Algarve Place Preferences: Peak

Category	Places Mentioned	% of Total
Loulé	Loulé, Quinta do Lago, Quarteira, Vale do Lobo, Vilamoura, Carvoeiro, Salir, Boliqueime, Almancil, Dunas Douradas, Golden Triangle, Julia's Beach, Monte João Preto.	24.2%
Lagoa	Ferragudo, Lagoa, Porches, Carvoeiro.	14.9%
Lagos	Lagos, Bensafrim, Luz, Praia da Luz.	13.6%
Albufeira	Albufeira, Castelo, Ferreiras, Galé, Guia, Olhos de Água, Paderne.	12.8%
Portimão	Alvor, Portimão, Praia da Rocha, Rocha.	8.0%
Faro	Faro, Azinheiro, Santa Bárbara de Nexe.	8.0%
Vila do Bispo	Sagres, Martinhal, Sagres, Arrifana, Budens, Burgau, Salema.	5.1%
Tavira	Cabanas/Tavira, Fonte do Bispo, Santo Estevão, Tavira.	3.4%
Olhão	Moncarapacho, Near Olhão, Olhão, Armona Island, Fuseta.	2.5%
Monchique	Caldas de Monchique, Marmelete, Monchique.	2.1%
Others	Cascais, Historical Centre, Huelva.	2.1%
Silves	Alcantarilha, Pera.	0.8%
São Brás de Alportel	São Brás de Alportel.	0.8%
VRSA	Montegordo.	0.8%
Castro Marim	Altura.	0.4%
S.B. Messines	S.B. Messines.	0.4%
Aljezur	Vale da Telha.	0.1%

Source: Author's fieldwork.

Table 6.23 – Algarve Place Preferences: Off-Peak

Category	Places Mentioned	% of Total
Albufeira	Albufeira, Albufeira/Galé, Near Albufeira, Olhos D' Água, Balaia, Pine Cliffs, Praia da Oura, Vale da Parra.	20.2%
Loulé	Almancil, Vilamoura, Loulé, Betunes, Quarteira, Quinta do Lago, Quinta do Lobo, Falésia, Vale do lobo, Alfontes.	20.2%
Lagos	Lagos, Praia da Luz, Espiche.	12.2%
Portimão	Portimão, Praia da Rocha, Alvor.	8.8%
Lagoa	Carvoeiro, Praia do Carvoeiro, Alporchinhos, Benagil, Porches, Ferragudo, Vale de Pinta, Vila Vita Parc, Porches.	8.0%
Tavira	Cabanas, Santo Estevão, Tavira, Luz.	7.1%
Faro	Faro, Faro/Boliqueime, Santa Bárbara de Nexe, Ria Formosa, Estoi.	5.0%
Vila do Bispo	Sagres, Salema, Vila Nova de Mil Fontes, Budens, Burgau.	5.0%
Silves	Armação de Pera, Pera, Silves, Algoz.	3.4%
Olhão	Olhão, Moncarapacho, Fuzeta, Quelfes.	3.4%
Others	São Brás, São Romão, Almádena, Barco, Monte Cana, Castro Marim, Aljezur, Cartaxo.	3.4%
VRSA	Monte Gordo.	2.5%
Monchique	Monchique.	0.8%

Source: Author's fieldwork.

Globally, UK tourists are spread out throughout the Algarve and their options follow the main tendencies of Algarve tourism flows, being concentrated in the best-known places that offer the greatest amount of accommodation. This finding is consistent with the accommodation availably previously detected as one of the decisive factors to visit the Algarve by the UK tourists reported in all the four samples. Simultaneously, despite much less evidence, there are options for places relatively less tourism orientated, such as the capital of the region, Faro, with values between 5.0% (off-peak) to 8.1% (pre-visit), and Olhão and Vila Real de Santo António (VRSA) whose maximum references are, respectively, 3.4% (off-peak) and 2.5% (off-peak).

In this distribution of regional tourism flows within the Algarve, a final note remark to place options beyond the immediate coastline, e.g. Santa Bárbara de Nexe and Santo Estevão, or even to small and more distant seaside cities such as Monchique and São Brás de Alportel.

As a summary, these tourists, after considering the weather conditions, the atmosphere and the air accessibility to be decisive factors to visit the Algarve, and after contemplating other possible choices of destinations mainly located in the south of Spain or France, they consult Flybe and/or TripAdvisor websites. After a short flight and transfer, they can enjoy the sunny climate and the relaxing attitude of friendly people in places like Vilamoura, Albufeira or Lagos. Perhaps near the beach they might be eating sardines and drinking “medronho”, wondering about the next walk on a sandy beach or to the golf course, benefiting afterwards from good value for money accommodation in a hotel or in their own or a friend or relative’s villa/apartment. Hopefully, when they return home, they will report positive reviews and useful tips about the Algarve.

6.3 Perceived Destination Image

After a first approach based on the knowledge of the factors influencing the destination image of the Algarve, namely the characterization of visitors and respective visit profiles, their travel behaviour and stereotypical image of the Algarve, the present section discusses the Algarve’s image specific attributes as perceived by these tourists, according to the model defined in Chapter 3 regarding the methodology and research design.

A total of 31 items covering the cognitive and affective image attributes were considered in the research, which represent the frequently used in TDI research, measured through a proxy to a continuum scale which ranges from very poor to very good (the ruler examples were presented in Figures 3.7, 3.8 and 3.9). Within the initial structure, other attributes were added that are not so frequently used and whose consideration emerged from aspects made relevant during the stakeholders' semi-structured interviews, as referred to in the chapter on methodology.

Summarizing the leading attributes of UK tourists' assessment of the Algarve, the ten most valued ones are emphasized in order to exhibit the main image attributes of the region. This is an option similar to the competitiveness data presentation used by Crouch (2007: 26) stating that "these ten determinant attributes are considered to be the most critical, in general", despite knowing that "it is important to recognise that all competitiveness attributes require monitoring and evaluation".

Using the mean value of each attribute, the ten most valued ones are highlighted, plus an eleventh, the overall satisfaction with the visit. This ranking is important to identify the dominant figures in Algarve TDI perceptions among the four samples: pre/post-visit, peak/off-peak. The leading attributes are confronted with the stereotyped image previously analysed; trying to confirm if there exists, or not, a consistency between the attributes most evaluated by UK tourists and the stereotyped image.

After this first approach, each pair of samples is tested in order to fulfil another main objective of the research: to test the existence of differences between image perception in the pre/post-visit, and equally in the peak/off-peak visit. To assess whether the means of the two groups are statistically different, a t-test was used with a significance level of 0.05%.

Finally, and specifically for the post-visit moment (when the UK visitors were interviewed they had just finished experiencing the region), a factor analysis was performed regarding the cognitive image attributes. This statistical analysis helps to reduce the number of factors from a larger number of variables (a group of 23 attributes) to a group of categories that enhances image analyses and communication processes with more manageable information (Zikmund, 2012; Wheeler et al., 2004) for future marketing actions and expands competitiveness practices.

Regarding the most valorised items, Table 6.24 identifies the ten greatest valued attributes in each sample, presenting these ranks in a unique table in order to support a simultaneous interpretation of the data.

It is quite evident that the climate and the distressing/relaxing Algarve atmosphere are the dominant attributes among the four samples/periods, with mean values of these two attributes near or above 8 points in a 0 to 10 scale. This result particularly reinforces the previous findings about the stereotypical image (Tables 6.16, 6.17, 6.18 and 6.19), in which the weather conditions and atmosphere are always the leading categories, fluctuating between 30.3% and 33.9% (weather conditions) and between 12.4% and 16.0% (atmosphere).

In a second analyse of image attributes identified on Table 6.24, it is possible to recognise a broader group of four attributes aggregating the natural heritage, available activities, the dichotomous pleasant/unpleasant (linked with atmosphere) and the local hospitality. The mean values of these four attributes range from 7.36 (local hospitality in post-visit) to 7.87 (natural heritage and available activities, both in the off-peak period). Once again these results are in line with the stereotypical image shown throughout the samples, in which the categories hospitality, natural beauty, beach and activities added to golf sport, always represent an important percentage of destination keywords.

TABLE 6.24 – TEN MOST VALUED ATTRIBUTES AND OVERALL VISIT RATE

Destination Atributes and Overall Visit Rate	Pre-Visit		Post-Visit		Peak		Off-Peak	
	Mean	Rank	Mean	Rank	Mean	Rank	Mean	Rank
Destination Atributes								
Climate	8.33	1º	8.04	1º	8.42	1º	8.10	1º
Distressing/Relaxing	8.09	2º	7.66	2º	7.99	2º	7.96	2º
Natural heritage (beaches, others)	7.86	3º	7.44	5º	7.64	4º	7.87	3º
Available activities (nautical sports, golf, kite surf, children activities, …)	7.74	4º	7.48	4º	7.51	5º	7.87	4º
Unpleasant/Pleasant	7.70	5º	7.50	3º	7.70	3º	7.58	5º
Local hospitality	7.51	6º	7.36	6º	7.38	6º	7.58	6º
Gastronomy (eating out)	7.40	7º	7.26	7º	7.36	7º	7.37	9º
Hotels quality	7.38	8º	7.16	9º	7.17	8º	7.45	8º
Quality in services (in shops, transport, public services, restaurants)	7.23	9º	7.20	8º	6.99	10º	7.46	7º
Shopping facilities in superstores	7.20	10	---	---	7.10	9º	---	---
Public accessibilities (is it easy to reach different places)	---	---	6.82	10º	---	---	---	---
Overall security (safety feeling, crime, …)	---	---	---	---	---	---	7.19	10º
(…)								
Overall Rate								
Overall, how would you rate your visit to Algarve?	8.15		7.79		8.00		8.14	

"---" Not included in the top 10 attributes of the respective sample.

Source: Author's fieldwork.

Finally, there is a third group of other three attributes that are constantly included in the most valued ones throughout the four samples, which are composed by the gastronomy, hotels quality and the quality in services, whose average value ranges from 6.99 (quality in services in peak) to 7.46 (quality in services in off-peak). When compared with the previous stereotypical image expressed by keywords, the main difference is concentrated in gastronomy, an attribute that always assumes around 10% of the total Algarve image keywords but "only" achieves the 7th or 9th position in the rank of the attributes' evaluation. A possible explanation may be that visitors know particular items of the gastronomy, e.g. "sardines", "seafood", "medronho" or "vinho verde", but lack to assume gastronomy as a global tourism product to be consumed and, as a consequence, an important but not leader attribute.

Throughout this analysis, it is important to highlight that the overall classification of Algarve's visit obtains a high evaluation, a result that promotes a generally good perspective, despite some negative differences between post and pre-visit, which is analysed further on.

In sequence, it was tested the existence of differences between image attributes perceptions in the pre/post-visit, a theme of crucial importance to determine image performance and its implications for destination competitiveness. These tests follow the studies of O'Leary and Deegan (2005), Wade and Eagles (2003) and Pike and Ryan (2004).

Table 6.25 summarizes the t-test applied, with significant attribute differences marked with an asterisk in columns 5 and 6.

Considering the highest significant differences between the pre/post-visit evaluation, it is notable that each one of these attributes reveals a lower performance after a visit experience. The attributes are as follows (ordered by gap size, in parentheses):

- Health services (-0.56)
- Overall security (safety feeling, crime, …) (-0.49)
- Distressing/relaxing (-0.43)
- Nightlife (-0.40)
- Shopping facilities in superstores (-0.40)

Despite the positive evaluation of each mentioned attribute, there are small negative differences between pre/post-visit, with the maximum gap being -0.56 on a scale from 0 to 10.

TABLE 6.25 - DESTINATION IMAGE ATTRIBUTE DIFFERENCES: PRE VS. POST-VISIT

Destination atributes	Pre-Visit n=315 Post-Visit n=332	Mean	Std. Dev.	T-Test P-Value equal variences assumed	T-Test P-Value equal variences not assumed
Public transportation (availability, coverage)	Pre-visit	5.89	2.42	.911	.903
	Post-visit	5.92	1.81		
Level of prices	Pre-visit	5.49	2.24	.273	.234
	Post-visit	5.72	1.87		
Value for money	Pre-visit	5.95	2.13	.937	.234
	Post-visit	5.94	1.85		
Local hospitality	Pre-visit	7.51	1.71	.329	.313
	Post-visit	7.36	1.60		
Quality in services (in shops, transport, public services, restaurants)	Pre-visit	7.23	1.71	.876	.865
	Post-visit	7.20	1.44		
Signposting (in the roads, main attractions, ...)	Pre-visit	6.24	2.33	.108	.269
	Post-visit	6.82	6.15		
Nightlife	Pre-visit	6.72	2.00	.062 *	.045 *
	Post-visit	6.32	1.67		
Enternainment (including events)	Pre-visit	6.62	2.01	.477	.452
	Post-visit	6.48	1.73		
Natural heritage (beaches, others)	Pre-visit	7.86	4.32	.251	.095
	Post-visit	7.44	1.54		
Overall security (safety feeling, crime, ...)	Pre-visit	7.21	1.87	.006 *	.007 *
	Post-visit	6.72	1.91		
Heritage and cultural events (monuments, museums, others)	Pre-visit	7.00	3.24	.258	.161
	Post-visit	6.67	1.89		
Gastronomy (eating out)	Pre-visit	7.40	1.87	.409	.383
	Post-visit	7.26	1.66		
Urban cleanliness	Pre-visit	6.60	2.10	.429	.385
	Post-visit	6.45	1.73		
Shopping facilities in local retail (Centres)	Pre-visit	6.89	1.91	.104	.079
	Post-visit	6.60	1.61		
Shopping facilities in superstores	Pre-visit	7.20	1.77	.022 *	.015 *
	Post-visit	6.80	1.54		
Tourist information	Pre-visit	6.68	1.89	.106	.150
	Post-visit	6.78	1.76		
Land use planning	Pre-visit	5.53	2.27	.466	.447
	Post-visit	5.72	2.04		
Public spaces conservation (well kept buildings)	Pre-visit	6.25	2.24	.658	.635
	Post-visit	6.35	1.92		
Climate	Pre-visit	8.33	4.23	.444	.225
	Post-visit	8.04	1.28		
Available activities (ex. nautical sports, golf, kite surf, children activities, others, ...)	Pre-visit	7.74	4.62	.521	.333
	Post-visit	7.48	1.40		
Public accessibilities (is it easy to reach different places?)	Pre-visit	6.93	1.92	.555	.528
	Post-visit	6.82	1.66		
Health services	Pre-visit	6.91	2.09	.017 *	.013 *
	Post-visit	6.35	1.82		
Hotels quality	Pre-visit	7.38	1.80	.265	.242
	Post-visit	7.16	1.59		
Overall, how would you rate your visit to Algarve?	Pre-visit	8.15	1.34	.006 *	.008 *
	Post-visit	7.79	1.39		
Destressing/Relaxing	Pre-visit	8.09	1.79	.019 *	.028 *
	Post-visit	7.66	2.04		
Modern/Traditional	Pre-visit	6.41	2.25	.484	.449
	Post-visit	6.55	1.90		
Unpleasant/Pleasant	Pre-visit	7.70	2.36	.371	.378
	Post-visit	7.50	2.43		
Arousing/Sleepy	Pre-visit	6.03	2.20	.313	.311
	Post-visit	5.81	2.17		
Gloomy/Exciting	Pre-visit	6.64	2.23	.581	.591
	Post-visit	6.52	2.36		
Artificial/Natural	Pre-visit	6.91	2.31	.542	.543
	Post-visit	6.78	2.32		
Overcrowded/Exclusive	Pre-visit	6.14	2.21	.950	.950
	Post-visit	6.15	2.17		

*Significant at 0.05 level

Source: Author's fieldwork.

It is worth mentioning that the five attributes with the statistical significant differences are linked with destination facilities and infrastructures, which affect not only the tourists, but also the place in the resident's perspective and, consequently, the overall image development of the destination. The results could influence the global visit image evaluation, whose difference is significant and has a negative gap:

- Overall visit rate (-0.36)

The results point to a generally very good level of image-attributes evaluation by UK tourists. However, special care must be taken due to the negative gaps between pre/post-visit image attributes' evaluation, and particularly because these gaps occur in attributes linked to facilities and infrastructures that could influence the region's development, while at the same time could affect the dominant stereotypes of the Algarve's image in terms of overall development. In a context of a growing competitiveness between destinations with similar products and facilities, these negatives gaps, if allowed to continue over the years, could cause a systematic decline in overall satisfaction and compromise the destination's attractiveness and competitiveness in the medium and long term.

Due to the high level of Algarve's seasonality demand flows, and aiming to check the existence or not of attributes with significant differences between the image perceptions throughout the year, a similar test of peak/off-peak data samples was conducted. The results are expressed in Table 6.26 and allow the identification of significant differences in two attributes. Taking the peak season as a reference, the attributes and size gaps (in parentheses) are:

- Quality of services: (-0.47)

- Modern/Traditional (-0.56)

TABLE 6.26 – DESTINATION IMAGE ATTRIBUTE DIFFERENCES: PEAK VS. OFF-PEAK

Destination atributes	Peak n=315 Off-Peak n=332	Mean	Std. Dev.	T-Test P-Value equal variences assumed	T-Test P-Value equal variences not assumed
Public transportation (availability, coverage)	Peak	5.95	2.29	.624	.621
	Off-peak	5.83	2.15		
Level of prices	Peak	5.43	2.12	.155	.156
	Off-peak	5.69	2.17		
Value for money	Peak	5.86	2.00	.268	.269
	Off-peak	6.04	2.12		
Local hospitality	Peak	7.38	1.68	.156	.156
	Off-peak	7.58	1.68		
Quality in services (in shops, transport, public services, restaurants)	Peak	6.99	1.73	.001 *	.001 *
	Off-peak	7.46	1.51		
Signposting (in the roads, main attractions, …)	Peak	6.30	4.75	.551	.543
	Off-peak	6.49	2.18		
Nightlife	Peak	6.52	1.84	.348	.352
	Off-peak	6.71	2.00		
Enternainment (including events)	Peak	6.61	1.81	.755	.759
	Off-peak	6.54	2.07		
Natural heritage (beaches, others)	Peak	7.64	1.45	.479	.503
	Off-peak	7.87	5.31		
Overall security (safety feeling, crime, …)	Peak	6.99	1.91	.191	.190
	Off-peak	7.19	1.87		
Heritage and cultural events (monuments, museums, others)	Peak	6.86	1.83	.764	.764
	Off-peak	6.94	3.71		
Gastronomy (eating out)	Peak	7.36	1.78	.945	.945
	Off-peak	7.37	1.85		
Urban cleanliness	Peak	6.53	1.98	.634	.634
	Off-peak	6.61	2.06		
Shopping facilities in local retail (Centres)	Peak	6.81	1.85	.992	.992
	Off-peak	6.81	1.83		
Shopping facilities in superstores	Peak	7.10	1.73	.875	.875
	Off-peak	7.08	1.70		
Tourist information	Peak	6.69	1.89	.824	.824
	Off-peak	6.73	1.80		
Land use planning	Peak	5.75	2.18	.135	.136
	Off-peak	5.40	2.23		
Public spaces conservation (well kept buildings)	Peak	6.39	2.12	.223	.223
	Off-peak	6.15	2.19		
Climate	Peak	8.42	5.00	.329	.318
	Off-peak	8.10	1.53		
Available activities (ex. nautical sports, golf, kite surf, children activities, others, …)	Peak	7.51	1.60	.338	.377
	Off-peak	7.87	5.72		
Public accessibilities (is it easy to reach different places?)	Peak	6.89	1.82	.884	.884
	Off-peak	6.91	1.89		
Health services	Peak	6.54	2.01	.126	.126
	Off-peak	6.89	2.01		
Hotels quality	Peak	7.17	1.70	.110	.109
	Off-peak	7.45	1.77		
Overall, how would you rate your visit to Algarve?	Peak	8.00	1.37	.192	.192
	Off-peak	8.14	1.35		
Destressing/Relaxing	Peak	7.99	1.76	.890	.890
	Off-peak	7.96	1.97		
Modern/Traditional	Peak	6.17	2.09	.002 *	.002 *
	Off-peak	6.73	2.21		
Unpleasant/Pleasant	Peak	7.70	2.26	.552	.554
	Off-peak	7.58	2.50		
Arousing/Sleepy	Peak	5.87	2.03	.278	.282
	Off-peak	6.07	2.35		
Gloomy/Exciting	Peak	6.74	2.19	.148	.149
	Off-peak	6.46	2.33		
Artificial/Natural	Peak	6.86	2.25	.835	.836
	Off-peak	6.90	2.38		
Overcrowded/Exclusive	Peak	5.99	2.11	.098	.100
	Off-peak	6.30	2.29		

*Significant at 0.05 level

Source: Author's fieldwork.

The two attributes – quality of services and modern/traditional - reveal important differences in a single region if analysed around the year. UK tourists are more pleased with the quality of services (shops, transport, public services and restaurants) in off-peak than in peak season. More time to deal with the client, less congestion on the roads, more "intimate" restaurants are hypotheses that may sustain this positive off-peak evaluation in a much less congested region. It should be noted that in 2013, the ratio between the number of tourists' overnights stays in the high and low season months (the seasonality index of the Algarve) reached 5.35 (IMPACTUR, 2014).

The region itself changes from more modern in peak to more traditional in off-peak, a result that might be influenced by family entertainment facilities and nightlife animation services, bars and large restaurants closing during the off-peak season. This is not a negative result in itself, it just displays a difference in perceptions, which may be included and used in target-promotion segments allocated to each season of the year.

Moreover, once the general visit image does not record a significant difference between peak/off-peak values, and with UK tourists generally satisfied around the year, a possible planning and marketing approach for the off-peak months might emphasize the two aspects referred to: higher quality in services and a more traditional atmosphere. These can happen without compromising the leading image attributes which maintain their relevance: climate, relaxing atmosphere, natural heritage, available activities and pleasant scenery.

Finally, and in order to have an integrated image perspective to determine the underlying dimensionality of the destination image, a factor analysis was undertaken in the attempt to aggregate those attributes in a comprehensive group of categories. A total of 23 attributes of cognitive-image measurement were factor-analysed (principal component analysis using a Varimax rotation). The factor analysis was performed on the post-visit data, assuming that this sample represents the most accurate perceptions of the Algarve's image assessment after experiencing the tourism destination. This approach resulted in the extraction of four factors. Image attributes with loadings of approximately 0.5 and above were used to represent the factors. The main results are expressed in Table 6.27.

The factors are presented on a grid/table which points to the attributes in the classification of Echtner and Ritchie (1991) and Gallarza et al. (2001), in order to have a better perspective of the nature of the attributes in the context of the factors created.

TABLE 6.27 – FACTORIAL ANALYSIS

Components	Gallarza (2001)		Echter and Ritchie (1991)		Factor Loadings	% of Variance	Cronbach alpha
	Func.	Psyc.	Func.	Psyc.			
I. Psychological Domain							
Local Hospitality		P		P	0.756		
Quality Services		P		P	0.794		
Overall Security		P		P	0.702		
Gastronomy	F	P		P	0.757		
Shopping Facilities Local Retail	F		F		0.807	57.1%	93.8%
Shopping Facilities Superstores					0.789		
Tourist Information	F		F		0.763		
Available Activities		P		P	0.797		
Public Acessibilities		P		P	0.692		
Health Services					0.645		
II. Functional Domain							
Public Transports	F			F	0.720		
Signposting	F			F	0.649		
Nightlife	F			F	0.727		
Enternainment	F			F	0.760		
Natural Heritage	F			F	0.526	5.9%	67.6%
Urban Cleanliness			P		0.533		
Land Use Planning				F	0.740		
Public Spaces				F	0.653		
Hotels Quality	F			F	0.582		
III. Economic Factor							
Level Prices		P	F		0.648		
Value Money		P			0.597	5.1%	62.9%
Heritage and Cultural Events	F		F		0.735		
IV. Climate							
Climate		P	F		0.898	4.5%	-

Note: Kaiser-Meyer-Olkin's measure of sampling adequacy=0.873
Source: Author's fieldwork.

The four factors explain 72.6% of the variance in the original variables. The statistics used to test if the factor analysis was appropriate were the Kaiser-Meyer-Olkin (KMO) statistic, whose result was 0.873, being considerable, and the Bartlett's Test of Sphericity with a Sig.=0.000. The findings of both tests suggest that the factor analysis was appropriate for this study, according to Pallant (2007) standards.

The results show that 63.0% of the variance is explained by only two factors. The first, 57.1%, identifies the psychological group of attributes according to Gallarza et al. (2001) and Echtner and Ritchie's (1991) attribute classification from psychological to functional (cognitive–affective). These results highlight the importance of a tourism destination to clearly understand the dimensions of destination image in order to promote better branding strategies. In the case of the Algarve, it is important to highlight that tourists aggregate several image attributes in the same domain, the psychological field, in which they perceive the Algarve in terms, for example, of service, hospitality and security, among others, which are mainly intangible and difficult to manage. The second factor, following the classifications of Gallarza et al. (2001) and Echtner and Ritchie (1991), considers the functional aspects of image, with attributes linked to the spatial planning questions of the territory being aggregated in the same factor (e.g. public transport, signposting, urban cleanliness). This factor is extremely important to destination management organisation due to its possible direct intervention in such aspects.

The economic (and cultural) factor considers price level and the notion of value for money as well as questions relate to cultural aspects. Finally, the climate assures a one-attribute factor group, a strong characteristic once again emphasised by the data.

It is evident that the factor analysis allocates in the psychological domain some leading value-image attributes, namely available activities, local hospitality and gastronomy. The same tendency happens in the functional domain, which contains some of the leading value-image attributes, namely natural heritage and hotel quality. With these two perspectives in mind, the sets of attributes should be carefully considered if image-management stakeholders opt to act, respectively, from psychological or functional destination perspectives.

6.4 Differences Between First and Repeat Visitors and Image Modification

In mature destinations such as the Algarve, well known by its visitors and facing an increasing competition between territories, the importance to guarantee a consistent image perception, well established or even improved by visitor experiences, is crucial to attract new customers and maintain its market share. As stated by Chi (2012: 21), “if a destination only relies on repeat customers, its market will eventually die out as some customers “defect” to other destinations, others stop travelling and still others die of natural causes”.

Due to the patterns found, it was considered more useful to cross the influential variables of destination image with the overall image evaluation in the post-visit sample, considering that the post-visit reflects a more in-depth destination experience. The importance of this overall image evaluation follows the recommendations of Qu et al. (2011: 473), who state that “it is the overall image (...) which influences tourist’s future behaviours”. This overall image evaluation is named image modification in the considered model.

In this context, the differences between the characteristics of those for whom their visit was the first and those for whom it was not, as well as the characteristics of those who had changed their image perceptions of the Algarve (for better or worse) and those who had not (image modification), was tested, namely:

- Differences between first-time and repeat visitors;
- Image modification differences;

This analysis was undertaken using t-distribution and chi square (X^2) tests in order to identify the relationships and mean differences between these two groups of variables and visitors’ profiles and travel behaviour.

Regarding the UK market in the Algarve, the analysis of the segment of repeat visitors is even more important, considering that the UK has been the main foreign market of the region since the 1970s, achieving 32.5% of total overnight Algarve stays in 2013, or 42.2% if considering only foreign markets (IMPACTUR, 2014). Simultaneously, and as emphasized in Section 6.2.1, the UK tourists interviewed revealed having known the Algarve, on average, for about 18 years, and had visited it about seven to nine times. These results express a high level of familiarity and loyalty with the destination but, on the other end, for about only one in each four tourists (26.4% to 28.1%) this visit is the first to the region. These data reinforce and make clear the evidence of the Algarve being a mature destination for UK tourists. It is well-known, tested and a prevailing repeat choice. As highlighted by Chi (2012: 3), “since many attractions and tourist destinations rely heavily on the repeat visitor segment, it would be of prime interest for destination managers to gain more knowledge on the repeater segment”.

The attraction of new visitors to the destination is essential but, simultaneously, it cannot jeopardize the loyalty of the repeaters. It is important to gain knowledge about these segments, questioning if it is their first visit and analysing if first-time and repeaters have, or not, different perspectives of, and behaviours within, the destination.

The answer to this question leads to the identification of the main differences between first-time and repeat visitors’ behaviour. In this context, significant differences were found among first-time and repeat visitors and the following three variables of the visitor and visit characteristics:

- Type of lodging;
- Intention to return in summer;
- Visitor’s age.

Regarding the image modification, during the last two decades, the Algarve has seen improvements in some of its main infrastructures and, simultaneously, new tourism facilities have been created or developed, with such investment being partially supported by European Union funds. First-time visitors do not have this perception of development, which repeat visitors might have. Do they have different characteristics and behaviours?

Two possible examples of these changes, among others, are the longitudinal highway of the Algarve, the A22, named “Via do Infante[32]”, which crosses the region west to east, with its length of 133 km (83 miles) having been completed

[32] Named in honour of Infante Dom Henrique, the leader of the early Portuguese overseas discoveries exploration in the XV century, whose nautical school was established at Sagres in the southwest limit of the Algarve.

in 2003, or the Algarve International Circuit, a 4.7 km (2.9 miles) race circuit located in the west of the territory, whose construction was finished in 2008 and which regularly hosts events for Formula One training/tests and Moto GP competitions, as well as other international racing events.

Using some data comparisons between the years 1995 to 2013, it is possible to reinforce the territorial and tourism facility changes in the Algarve. The number of beds in the hospitality sector has grown from 77,316 to 106,625 (Statists Portugal, 2014), and even higher growth rates have been seen for products critical to tourism diversification, e.g. golf and recreational cruising (sailing and motor yachts). The number of golf courses doubled from 17 to 34 and the number of available berths in marinas and recreational ports increased from 1,918 to 4,081 (AHETA, 2014; CIITT, 2008).

In the context of image modification in the post-visit, the results mark the existence of significant differences within image modification perceptions of the Algarve and visitor and visit characteristics in four variables:

- Booking behaviour;
- Return in summer;
- Willingness to recommend the Algarve to friends and relatives;
- First-time or repeat visitors.

With the focus on key variables – first-time/repeat visitor and image modification – and to examine whether each pair of variables was independent or not, a chi-square test with a 0.05 level of significance was conducted. The results for the first-time/repeat visit are summarized in Tables 6.28 to 6.30, and for image modification in Tables 6.31 to 6.34.

Considering the first key variable – first-time/repeat visitor – and its binomial type of data (“yes” for first visit or “no” for repeat visit) an initial finding is that first-time visitors behave significantly different from repeat visitors in the type of lodging chosen, as shown in Table 6.28.

The descriptive data for the percentages of each type of lodging demonstrate that first-time visitors are more "classic" in their decisions about the type of lodging. They largely prefer hotels, 55.3%, an option that is reduced to 36.7% among repeat visitors. The latter can be expected to constitute a higher percentage of those who already have their own house, a rented house or use a friend or relative's accommodation.

TABLE 6.28 – FIRST VISIT TO ALGARVE VS. TYPE OF LODGING

			Type of Lodging				Total
			Hotel	Own house	Rented house	Friends & relatives house	
First Visit to Algarve	Yes	Count	68	11	24	20	123
		% within firstvisit Algarve	55.3%	8.9%	19.5%	16.3%	100.0%
		% of Total	14.5%	2.3%	5.1%	4.3%	26.2%
	No	Count	127	60	80	79	346
		% within firstvisit Algarve	36.7%	17.3%	23.1%	22.8%	100.0%
		% of Total	27.1%	12.8%	17.1%	16.8%	73.8%
Total		Count	195	71	104	99	469
		% within firstvisit Algarve	41.6%	15.1%	22.2%	21.1%	100.0%
		% of Total	41.6%	15.1%	22.2%	21.1%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	14,151[a]	3	.003

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 18,62.

Source: Author´s fieldwork.

These considerations might explain the importance of the residential property market in the Algarve, a compromise between visitor and destination that only a medium or long-term perspective can support. It is clearly a different behaviour when compared to the immediate horizon of a first-visit perspective. The second finding about first-time visitors' different behaviour compared to repeat visitors focuses on the intention to return in summer to the Algarve, as shown in Table 6.29. Previous to the analysis of differences, it is important to stress that in both cases, first-time or repeat visitors, the return intention is extremely positive, as previously shown in Section 6.2.1, a result that enhances the perspective of a good level of satisfaction with the destination experience.

In this positive context, first-time visitors tend to show a relatively lower commitment to the destination, and "only" 77.6% reveal an intention to return in summer. This is a percentage that increases to an almost full consensus when analysing repeat visitors, which once more demonstrates their strong loyalty to the destination.

TABLE 6.29 – FIRST VISIT TO ALGARVE VS. INTENTION TO RETURN IN SUMMER

			Return Intention		Total
			Yes	No	
First Visit to Algarve	Yes	Count	97	28	125
		% within firstvisit Algarve	77.6%	22.4%	100.0%
		% of Total	20.4%	5.9%	26.3%
	No	Count	325	25	350
		% within firstvisit Algarve	92.9%	7.1%	100.0%
		% of Total	68.4%	5.3%	73.7%
Total		Count	422	53	475
		% within firstvisit Algarve	88.8%	11.2%	100.0%
		% of Total	88.8%	11.2%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	21,629[a]	1	.000

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 13,95.

Source: Author's fieldwork.

The third and final finding about first-time and repeat visitors' significant differences concerns the age of tourists, with the main results shown in Table 6.30.

TABLE 6.30 – FIRST VISIT TO ALGARVE VS. AGE RANGE

			Age Classes				Total
			18-24	25-44	45-64	65+	
First Visit to Algarve	Yes	Count	16	30	53	21	120
		% within firstvisit Algarve	13.3%	25.0%	44.2%	17.5%	100.0%
		% of Total	3.7%	6.9%	12.1%	4.8%	27.5%
	No	Count	18	74	168	57	317
		% within firstvisit Algarve	5.7%	23.3%	53.0%	18.0%	100.0%
		% of Total	4.1%	16.9%	38.4%	13.0%	72.5%
Total		Count	34	104	221	78	437
		% within firstvisit Algarve	7.8%	23.8%	50.6%	17.8%	100.0%
		% of Total	7.8%	23.8%	50.6%	17.8%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8,010[a]	3	0.046

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 9,34.

Source: Author's fieldwork.

Despite the existence of a general domain of visitors between the ages of 45 and 65 in both groups, the results demonstrate slight evidence for a higher percentage of young visitors among first-time visitors than between repeat visitors. If this could be generalized, then it becomes an important outcome since it might represent an opportunity to retain new and younger tourists; an inversion to the dominant age group of this mature destination.

Regarding the second key variable, image modification, and its type of data divided in three categories, 1 – yes, better than expected, 2 – no, stayed the same and 3 – yes, worse than expected, four variables were detected as being significant. The first finding is that the image modification behaves significantly different in terms of the booking behaviour, as presented in Table 6.31.

TABLE 6.31 – CHANGED IMAGE OF ALGARVE VS. INSTRUMENT USED TO MAKE THE RESERVATION

			Where Make the Reservation					Total
			Travel Agency	Internet	Friends & Relatives	Telephone	Other	
Change Image Algarve	Yes, for better	Count	19	118	22	4	4	167
		% within change image	11.4%	70.7%	13.2%	2.4%	2.4%	100.0%
		% of Total	4.2%	26.3%	4.9%	.9%	.9%	37.3%
	No, stayed the same	Count	22	220	13	7	8	270
		% within change image	8.1%	81.5%	4.8%	2.6%	3.0%	100.0%
		% of Total	4.9%	49.1%	2.9%	1.6%	1.8%	60.3%
	Yes, for worse	Count	3	7	1	0	0	11
		% within change image	27.3%	63.6%	9.1%	0.0%	0.0%	100.0%
		% of Total	0.7%	1.6%	0.2%	0.0%	0.0%	2.5%
Total		Count	44	345	36	11	12	448
		% within	9.8%	77.0%	8.0%	2.5%	2.7%	100.0%
		% of Total	9.8%	77.0%	8.0%	2.5%	2.7%	100.0%

	Value	df	Asymp. Sig.
Pearson Chi-Square	16,130[a]	8	.041

a. 6 cells (40,0%) have expected count less than 5. The minimum expected count is ,27

Source: Author's fieldwork.

This relation might expose a troublesome figure for the tourism trade based on high street travel agencies. The fact is that among the tourists that use these travel agencies to make their reservation, the proportion of those that change their perspective of the Algarve's image for worse is larger compared to those who make their reservation by the Internet. Considering that the first ones are also those with a lower use of the Internet, it is possible to assume, at least as a predisposition, that the (good) use of the Internet for the booking process might expand the chances of maintaining or improving one's perception of the Algarve's image.

The second significant variable, when crossed with the image-modification variable, is the intention to return in summer, with the data analysis summarised in Table 6.32.

TABLE 6.32 – CHANGED IMAGE OF ALGARVE VS. INTENTION TO RETURN IN SUMMER

			Return Intention Summer		Total
			Yes	No	
Change Image Algarve	Yes, for better	Count	156	16	172
		% within change image	90.7%	9.3%	100.0%
		% of Total	34.4%	3.5%	38.0%
	No, stayed the same	Count	241	29	270
		% within change image	89.3%	10.7%	100.0%
		% of Total	53.2%	6.4%	59.6%
	Yes, for worse	Count	6	5	11
		% within change image	54.5%	45.5%	100.0%
		% of Total	1.3%	1.1%	2.4%
Total		Count	403	50	453
		% within	89.0%	11.0%	100.0%
		% of Total	89.0%	11.0%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	13,821[a]	2	.001

a. 1 cells (16,7%) have expected count less than 5. The minimum expected count is 1,21.

Source: Author's fieldwork.

It is evident that when UK tourists modify their image for the worse, the percentage for a return in summer clearly declines if compared with the same intention for tourists who maintained or improved their image perception of the region. This result is itself a demonstration of the importance for the destination to achieve a good image performance, in order to support and create new tourism flows.

Cumulatively, with the previous analysis, the third significant variable in this image modification perception is the intention to recommend the Algarve to friends, as expressed in Table 6.33.

TABLE 6.33 – CHANGED IMAGE OF ALGARVE VS. WILLINGNESS TO RECOMMEND A VISIT TO FRIENDS

			Recommend		Total
			Yes	No	
Change Image Algarve	Yes, for better	Count	149	2	151
		% within change image	98.7%	1.3%	100.0%
		% of Total	35.8%	0.5%	36.3%
	No, stayed the same	Count	250	5	255
		% within change image	98.0%	2.0%	100.0%
		% of Total	60.1%	1.2%	61.3%
	Yes, for worse	Count	6	4	10
		% within change image	60.0%	40.0%	100.0%
		% of Total	1.4%	1.0%	2.4%
Total		Count	405	11	416
		% within	97.4%	2.6%	100.0%
		% of Total	97.4%	2.6%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	55,691[a]	2	.000

a. 2 cells (33,3%) have expected count less than 5. The minimum expected count is ,26.

Source: Author's fieldwork.

The results reinforce an obvious meaning. When UK tourists maintain or change the image of the Algarve for the better, then the percentage of non-recommendation to friends to visit the region are clearly residual, respectively 2.0% and 1.3%. In opposition, if the image perception changes for worse, then the non-recommendation percentage reaches 40.0%. Once again, this figure demonstrates the importance for the destination to achieve a good image performance, a result that if not well managed could put at risk the creation of new tourism flows via negative WOM. This risk is enhanced when considering that 32.5% to 37.8% of UK visitors rely on friends and relatives to obtain information about the Algarve, as expressed in Section 6.2.1.

Finally, the fourth significant variable that crosses with image modification acts as a final conclusion about the importance of a consistent image perception, well established and improved by a visit experience. As shown in Table 6.34, the percentage of first-time visitors that change their image perception to better than expected is clearly higher than the percentage revealed by repeat visitors.

TABLE 6.34 – CHANGED IMAGE OF THE ALGARVE VS. FIRST-VISIT

			First Visit: Yes	First Visit: No	Total
Change Image Algarve	Yes, for better	Count	67	105	172
		% within change image	54.0%	31.1%	37.2%
		% of Total	14.5%	22.7%	37.2%
	No, stayed the same	Count	53	226	279
		% within change image	42.7%	66.9%	60.4%
		% of Total	11.5%	48.9%	60.4%
	Yes, for worse	Count	4	7	11
		% within change image	3.2%	2.1%	2.4%
		% of Total	0.9%	1.5%	2.4%
Total		Count	124	338	462
		% within	100.0%	100.0%	100.0%
		% of Total	26.8%	73.2%	100.0%

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	22,103[a]	2	.000

a. 1 cells (16,7%) have expected count less than 5. The minimum expected count is 2,95.

Source: Author's fieldwork.

Since a change for the worse is residual in both groups, this means that the region benefits from a well-established image perception – 66.9% of repeaters and 42.7% of first-time visitors maintained their image – but there is room for improvement, particularly among the latter ones. For the tourists who are on their first visit to the Algarve, 54.0% revealed having changed the image perception for the better, 22.9 percentage points more than the repeat visitors. This result enhances image management as a strategic instrument for increasing tourism flows (first-time visits) and consolidation (repeat visitors), both of which are key factors for the Algarve's competitiveness as a tourism destination.

6.5 CONCLUSION

Considering the data analysis conducted and the outcomes highlighted, the present chapter makes a strong contribution to the main findings of the thesis. In fact, this analysis offers key inputs to a deeper understanding of the visit and visitor profiles of the Algarve as a tourism destination and clarifies the Algarve's TDI and the main factors that influence it.

The results demonstrate that visitors are balanced between the genders, a fact that is justified by group composition, i.e., holidays are taken as a family, with a partner or as a nuclear family with children. The respondents are middle-aged (45–54 years old) or at a “grey” age, i.e. over 65, and have secondary or university education. These tourists travel on average three times per year, mainly in the summer or at Easter.

Regarding visit characterization, the results demonstrate that Algarve’s visitors have high levels of familiarity with the destination, knowing the Algarve for a long time, about 18 years. As a result, approximately 70% of visitors are repeaters, with an average number of previous visits of roughly 9. Specifically considering visit profile, they stay overnight in the Algarve, mainly in a hotel or rented house, and have an average stay of about 9 nights, higher than the common average stay in the Algarve referred to in the statistics for all the markets that visit the Algarve. The average individual expenditure varies between £94 and £106 per day, being the main expenses concentrated on accommodation, food and beverages.

The decision to come to the Algarve is primarily made by referring to the Internet or relying on friends or relatives as sources of information, being the Internet the foremost subsequent booking tool for these tourists. The choice to visit the Algarve was made by the respondent or by their partner or spouse. The return intention is higher in summer and the willingness to recommend is the same. On average, visitors book a holiday two months in advance.

As a result, WOM promotion is an unequivocally important promotion vehicle, with the consequent importance of the destination to fulfil visitors’ expectations between pre/post-visit along the year.

Open-ended questions were asked to understand decisive factors, competitive destinations, websites consulted, the Algarve’s stereotypical image and place preferences within the Algarve. The results were particularly important to achieve a comprehensive acknowledgement of the Algarve’s destination image between the UK tourists, and to deliver inputs to the final recommendations for tourism destination branding and management improvements.

It was verified that weather conditions are the most important decisive factor referred to for dislocation to the Algarve, revealing items as “sunshine”, “not too hot” or “late sun”, among others. This “pleasant weather” is accomplished by other decisive factor, the availability of accommodation, mentioned as an important factor for family holidays. The link between these two previous factors is established by the air accessibility, widely mentioned by the tourists namely as “easy flights” or “closeness to UK”.

Related to destinations in competition with the Algarve, a total of 57 countries were mentioned, mainly Spain, with emphasis on the Costa del Sol and Costa Blanca, adding the Canary Islands in the off-peak season. Portuguese localities are mentioned such as in the areas of Lisbon or Oporto, or the Atlantic islands of Madeira and Azores. France followed by Greece (particularly the Greek islands) and Italy were also considered important competitive destinations.

Regarding websites identified as helpful to obtain information about the Algarve, the main ones considered were the Flybe website and TripAdvisor. An important mention should be given to the owners vacation rentals websites, particularly the Ownersdirect.com, a website mainly linked to the rental of villas and apartments directly by their owners. In addition hotel websites were also important in this context.

Three keywords were asked for to describe the Algarve as a tourist destination; an analysis to capture the Algarve’s stereotypical image. The weather conditions and atmosphere perceptions were widely mentioned, and the findings were considered consistent with the attributes measured afterwards in the closed questions of the questionnaire.

For place preferences within the Algarve, the main ones referred to by the UK tourists were Albufeira, Vilamoura, Quinta do Lago and Vale do Lobo, i.e., the main tourist accommodation territories in the Algarve.

The global structure of the Algarve's TDI was finally tested and the differences between pre/post-image and peak/off-peak identified. The results indicate pre/post-visit significant differences for attributes related to the health services, overall security (safety feeling, crime, …), distressing/relaxing factor, nightlife, shopping facilities in superstores, and the overall visit rate. Regarding peak/off-peak analysis, the main differences were found between the quality of services and modern/traditional aspects of image. The factor analysis enabled the identification of four factors, namely, psychological, functional, economic, and climate, of which the psychological domain is dominant.

Globally, these image findings are positive but, simultaneously, they allow to question a particular challenge for the Algarve's competitiveness, which is based on the difficulty to identify image uniqueness attributes – besides some particular gastronomy or few historical references - that helps to differentiate the Algarve from its main holiday resort competitive destinations. In a globalized market and with the life-cycle maturity stage achieved, this challenge is even more critical.

Linked to the importance of the tourism flows sustainability, differences were found between first-time and repeat visitors in the type of accommodation chosen, the return intention in summer and the visitors' age. It became evident that first-time visitors prefer hotels and are relatively less predisposed to return (in summer), but simultaneously they rejuvenate the age pattern of the UK visitors.

The image modification expressed had differences in the variables of booking behaviour, return intention in summer, friends and relatives' recommendations and first-time/repeat visitors. The booking behaviour stressed the actual discussion between online agencies and high street agencies, with the use of the latter revealing a change of the destination's image to worse, an option almost inexistent in the other booking tools.

Those who change the image for better tend to return in summer and recommend friends and relatives to visit the destination. Finally, stressing the importance of the balance between first visitors and repeat visitors, more than half of the first-time visitors change the image perception for the better, and about two in three repeaters maintained their image. In both groups the change for worse is residual. This signifies the secondary image management should be strengthened among the potential new visitors/markets and the primary image carefully monitored, both as an integrate instrument for the Algarve's tourism destination competitiveness.

CHAPTER 7 – CONCLUSION

7.1 INTRODUCTION

The main objectives of this research are linked with TDI conceptualization and measurement, in order to develop and apply a model of image assessment to support tourism destination branding and competitiveness strategies, particularly in the case of the UK market in the Algarve. The research responds to the need expressed by numerous authors to seek a better understanding of the travel market based on image. As stated by Leisen (2001: 49), “Faced with the great variety of competing destinations, the traveller must eliminate some options owing to time and money constraints” and “In a state of high competition among destinations and their often limited promotional resources, marketers must identify the images held by travellers and select the most representative target markets”. The author argues that this kind of study can make a contribution to the “optimal allocation of promotional resources and ultimately lead to higher conversation rates of advertisements and increased travel to the destinations” (Leisen, 2001: 49). Kneesel et al. (2010: 68) state that, “It is crucial to assess actual and potential tourists’ images of destinations (...) for brand development processes and efforts (...) also in order to identify gaps between brand image (...) and brand identity”. Furthermore it can help to fill the gap which exists in the academic literature, regarding the factors that can contribute to better management practice in destination branding and competitiveness based on models of TDI measurement.

The research determines the overall destination image of the Algarve and how destination image differs between pre/post-visit, and between peak/off-peak visitors. The main outputs highlight the importance of first-time visitors versus repeaters, as well as image modification, and the options assumed in order to understand the existence of differences between them, and the influential factors of destination image. The introduction of the variable image modification follows the recommendations to avoid crossing different components of destination image, and the focus on overall image evaluation (whether it is above or below the expectations). This is defended by Baloglu and Brinberg (1997) who note that image attributes are "closely intertwined" and may not be isolated. Qu et al. (2011) defend that it is the overall image, the total impression, which influences future behaviour.

The first-time and repeat visitors' options analysis was conducted as a result of several literature findings, namely as stated by Chi (2012: 3), "Since many attractions and tourist destinations rely heavily on the repeat visitor segment, it would be of prime interest for destination managers to gain more knowledge on the repeater segment". It is defended by the same author that marketing strategies should be different between the two different segments, "marketing efforts directed primarily at enticing new visitors to a destination may be entirely inappropriate for encouraging previous visitors to return" and "the implementation of effective promotional and functional activities targeted at first-timers and repeaters requires a sound understanding of these two dissimilar groups" (Chi, 2012: 3).

To achieve this main objective, multiple models of TDI evaluation and measurement were analysed in a review of the literature, and the concepts of TDI place delimitation and management implications were systematized. Branding is presented as a management tool particularly in its relation to destination image. A preliminary research model was developed as a result of the literature-review analysis. Next, a theoretical framework with appropriate tools for measurement was constructed, i.e. questionnaires and semi-structured interviews. Prior to the questionnaire construction, ten semi-structured interviews to students and five to regional stakeholders were undertaken in order to capture the relevance of the questions to be included in the questionnaire and to give some guidelines for future destination management and branding practices. A pilot test of the questionnaire instrument was undertaken on the first day of the fieldwork. The questionnaires were applied in the pre/post-visit over four months, integrating peak/off-peak periods. During their collection, it was found that, despite some possible improvements, the questionnaire design was consistent with the research objectives' fulfilment, with a very positive attitude from tourists asked to participate in the research, with just slightly more difficulty in the baggage-claim area, no doubt due to the anxiety of arrival and luggage identification.

The aims of this final chapter are to present the main findings of the research, to address the key contributions to research methods, and theory and to discuss possible implications of the research for management practices.

7.2 RESEARCH FINDINGS

This section presents the main findings obtained, considering the seven objectives described in Chapter 1 and 3 related to the methodology, research developments during the process of conceptualization and data analysis. From a theoretical perspective, the research offers an up-to-date view of TDI background and actual research trends, where image study is being widely applied to cities (Hui and Wan, 2003), natural parks (Kastenholz, 2002), countries (Pike and Ryan, 2004) and states (Bonn et al. 2005; Reilly, 1990), among others.

This research makes contributions to the methodology, as it defines a unique method to develop, in a specific market and region, a study of the links between seasonal demand and primary and secondary image, supported by a comprehensive set of functional and psychological image attributes and, finally, influential image factors in this context. The delivered output is based on first-time visitors versus repeaters and image modification, a crucial issue for mature tourism destinations, as recognized by Chi (2012) and Fakeye and Crompton (1991).

Finally, from an empirical perspective, the model developed in the present research proves to be consistent with the knowledge needs and objectives of the study, allowing a set of outputs that can be analysed in the context of applied scientific research to a “real” destination, and, in future developments permitting efforts to be tested in other markets and territories to achieve its possible theoretical generalization.

<u>Objective 1:</u> To investigate the framework of destination image concepts and related methodological developments in destination branding and competitiveness models.

Regarding this objective, the research undertaken enabled understanding tourism destination concepts and the role of destination marketing in the DMOs context. This objective follows the recommendation of several authors regarding the lack of knowledge on destination image in its contribution to destination branding (Hall, 1999; King, 2001; Boo et al. 2009; Pike 2009 and Qu et al. 2011). By linking three different research fields (image/branding/competitiveness) the model offers an integrated framework which could contribute to new improvements on destination marketing conceptual and empirical practices. The research points out the necessary distinction between spaces, places and flows. The discussion embraced by different authors was important to highlight the need to consider destinations from a perspective of "lived experiences" with a combination of different actors. Due to some time and dimension constraints on the work, the research focused its attention on the analysis of tourism stakeholders and visitors to the Algarve as a tourism destination. A discussion of the question of tourism boundaries as introduced by Shaw and Williams (2004) was extremely important for the research's development, being responsible for the questions included in the questionnaire for tourists regarding their place preferences within the Algarve. The Algarve's main economic activity is the tourism industry, and although administrative boundaries are defined considering the regional socio-economic equilibrium, they are somehow unbalanced due to the coastal concentration of tourism.

The research highlights that tourists do not recognise "administrative boundaries", instead they recognize "tourist destinations", as confirmed by the fact that references to place preferences within the Algarve are sometimes expressed by the name of the beach attended, such as "Praia da Rocha" or "Praia da Falésia", sometimes the name of the hotel or of the tourist destination, for example "Vilamoura" or "Vale do Lobo". The identification of place preferences within the Algarve could act as an input to construct branding strategies and support. Underneath the umbrella brand, the Algarve may construct sub-brands with identified place preferences, as defended by Moilanen and Rainisto (2009). A discussion of the role of destination marketing in DMOs allowed an understanding of the functions of different stakeholders, which was important to define key questions to be included in the stakeholders' semi-structured interviews, namely regarding the delimitation of stakeholders' competencies in the fragmented industry which is tourism, as expressed by Buhalis (2000).

Destination competitiveness models and concepts were analysed, mainly linked to TDI concepts and scope, with influential variables and models of image formation and measurement. A first spotlight on the question was introduced by Ritchie and Crouch (2000, 2003), who expressed the need to increase tourism expenditure and offer memorable experiences, which leads to the importance to measure visitors' daily expenditure. Measurement of destinations in competition with the Algarve emerged from the questionnaire, identifying destinations that struggle for approximately the same markets and segments as the Algarve.

Further work needs to be undertaken in order to study and measure the Algarve's competitive position in the ongoing competitive-framework context identified. Authors including Lawson and Niven (1994), Enright and Newton (2005), Wolfe and Kang (2004), Kozak (2002) and Yoon (2002) and Bahar and Kozac (2007) have expressed the need to quantify variables such as TDI, repeat intention and customer satisfaction. These variables were considered in the model of analysis and quantified in the applied research on UK visitors to the Algarve as a tourism destination. The questions introduced in the Travel and Tourism Competitiveness Report 2008 were considered in the stakeholders' semi-structured interviews. The need for a better understanding of TDI has been explored by several authors in the field of competitiveness, with Hankinson (2004) reinforcing its importance and the need to achieve the desired positioning and Bahar and Kozac (2007) comparing the competitive position of Turkey with five elected countries in the Mediterranean.

Consequently, TDI concepts and models of destination image measurement were detailed. From a theoretical point of view, this meta-analysis was extremely important in order to obtain a clear understanding of the actual stage of image research, supporting the development of a knowledgeable model of analysis. In fact, it was this meta-analysis that enabled the construction of a model and the design of instruments to implement the fieldwork, data collection and methods of analysis, with a subsequent understanding of the role of image and its influential variables in different contexts. In this area, emphasis should be put on work regarding destination image management strategies: positioning, promotion and competitiveness, as studied by several authors including Gartner (1989), Echtner and Ritchie (1991), Ahmed (1991), Schroeder (1996) and Pike and Ryan (2004), to mention just a few; image in the context of familiarity/experience with the destination has been studied by Pearce (1982), Crompton (1979) and Phelps (1986); preference and intending or not intending to visit have been studied by Mayo (1973), Hunt (1975) and Milman and Pizam (1995), and studied in the context of socio-demographic variables developed by Baloglu (1997), Walmsley and Jenkins (1993) and Beerli and Martín (2004). O'Leary and Deegan (2005) made an important contribution to the study of destination image in the pre/post-visit. Regarding influential variables in destination image, Boo and Busser (2006) conducted an extensive review of the literature which enables to understand and know about the wide-ranging work done in this domain and the different variables tested in several contexts.

<u>Objective 2:</u> To create a model of analysis for TDI measured in different periods of time and composed by the main variables which could improve destination branding and competitiveness strategies.

The model was created considering the gaps revealed in the literature review. It was further developed in an empirical perspective taking into account the inputs of the semi-structured interviews' and the pre-interviews to the questionnaire construction. The final model integrates the links between three fields of research (image, branding and competitiveness) and aims to analyse four periods of time concerning the visit: pre/post-visit and peak/off-peak. Regarding the literature review several authors were considered, including, Baloglu and McCleary (1999) Gallarza et al. (2001) and Tasci et al. (2007) which gave an important contribution through a meta-analysis which considers the main scope of studies of TDI.

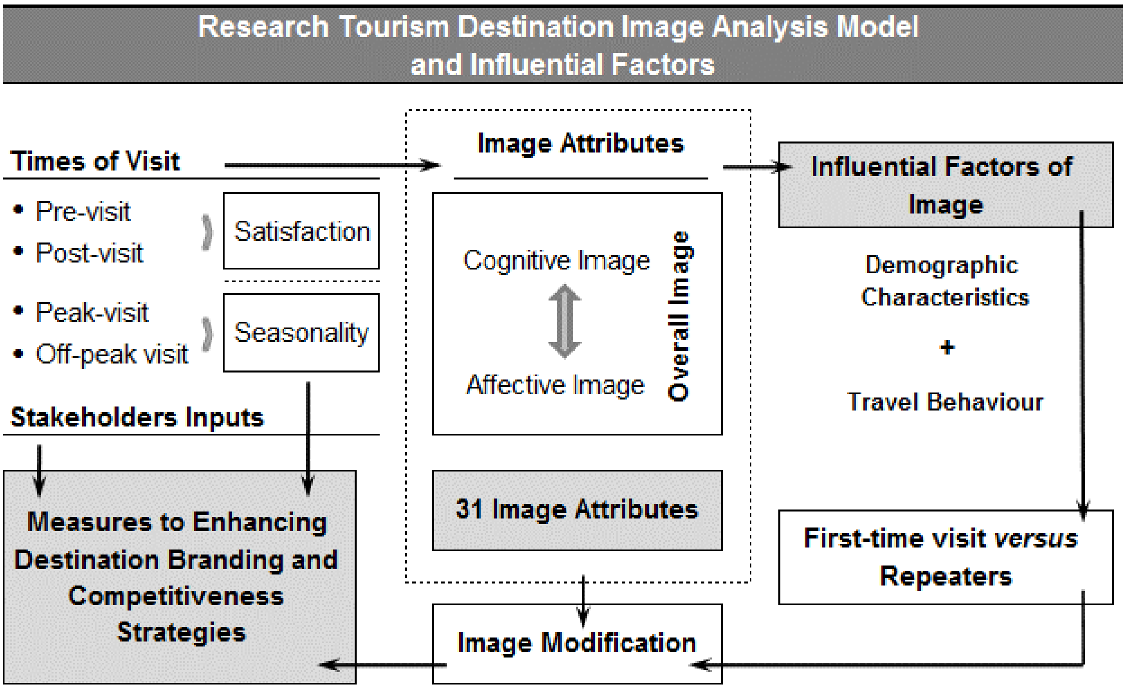
It was evident that destination image may be analysed contextually. Specifically, its conceptualization and dimensions. This would include: destination image formation process, TDI measurement, destination choice process, destination image management strategies (positioning, promotion, competitiveness), image and satisfaction, temporal change, image from a supply perspective, visitor's image and projected image, image spatial differences, impacts of conflicts on image, TDI in the context of events, segments of a population, familiar and unfamiliar influence on destination experience, close market and distant market, country of origin, preference and intending or not intending to visit, travel purpose, destination loyalty (first-time and repeat visitors), future behaviour, visual image, destination image and destination branding, destination image and sources of information and image analysed by socio-demographic variables.

It was also possible to conclude that destination image encompasses the role of the travel destination choice models, for example, Moutinho (1987), Woodside and Lysonski (1989) and Crompton (1992) inter alia. Some authors focused their attention on the destination image formation process such as Hunt (1975), Fakeye and Crompton (1991) and Baloglu and McCleary (1999). Others specifically in the context of positioning strategies, for instance Crompton et al. (1992), defend the study of factors that influence the formation of image or, in the context of different segments of the population, to understand influential factors such as sociological and psychographic characteristics, and purpose of travel. The influence of experience on the destination which is present in Phelps (1986), Chon (1990) and O'Leary and Deegan (2005). Boo and Busser (2006) included the influence of variables' on destination image.

The construction of models on destination image formation highlighted the work of Baloglu and McCleary (1999), which presents an important methodological framework that attempts to understand the methodological grid for the process of image formation (considering that image is formed by personal factors and stimulus factors). Previously, Gartner (1993) argued that the motivation to travel is a push-pull consequence and Chon (1990) ponders that the satisfaction experienced by visitors largely depends on the comparisons made between the expectations and the reality (primary images) "lived" in the destination.

Considering the models analysed and the destination image measurement, both studied in the literature review, it was possible to establish the final model of analysis formed by a set of variables and four different samples or segments as presented in Figure 7.1. The TDI was measured by 31 affective and cognitive image attributes. Part of these attributes were previously tested by different authors and, cumulatively, others were added in the present research as a result of the stakeholders' semi-structured interviews and the previous interviews with potential tourists at "Essex Summer School in Social Science Data Analysis - 2010".

FIGURE 7.1 – CONCEPTUAL FRAMEWORK OF THE TOURISM DESTINATION IMAGE MODEL APPLIED IN THE RESEARCH



Note: Previously referred as Figure 2.8 in Chapter 2.

The potential influential factors of destination image were measured, a total of 13 groups of variables were considered plus five open-ended questions regarding destination image and tourism behaviour. The variables were selected considering the review of literature concerning TDI measurement and the specific characteristics of the destination. Referred to as a limitation by Gallarza et al. (2001) normally TDI measurement is lacking, in that it either considers only a theoretical framework or only focuses on statistical analysis. This research attempts to fulfil this gap considering both approaches. The questionnaire follows the recommendation of Echtner and Ritchie (1991, 1993), Jenkins (1999) and Gallarza et al. (2001) which defend the inclusion of both structured and non-structured methodologies in TDI measurement, and the consulted studies presented on Table 2.9., regarding destination image measurement by author and methodology used. Both methods have advantages and disadvantages as considered by Jenkins (1999) and Kastenholz (2002).The list of attributes considered were selected reflecting on the attributes used to develop an itemized scale produced by Echtner and Ritchie (1991) and the meta-analysis developed by Gallarza et al. (2001). These variables were then tested in questionnaires applied to the four sub-samples used. The results made it possible to achieve the objective of creating an applied model of analysis for TDI and its influential factors.

<u>Objective 3:</u> To compare the profiles and images of four different target markets of visitors: pre/post-visit and peak/off-peak seasons in the Algarve as a tourist destination.

For this objective it was extremely important to understand the Algarve profile of UK tourists regarding visitor characteristics, visit profile and travel behaviour. The results demonstrate a family decision to visit the Algarve, i.e. a family destination, travelling as a household with children when considering middle-aged travellers, or travelling ‘only’ with a partner if the visitor has over 65 years old, with this last option arising mainly in winter. Most of the visitors have an academic degree and travel on average three times per year, mainly in summer or at Easter.

The respondents had a high level of familiarity with the destination, knowing the Algarve on average for about 18 years, and the incidence of repeaters were also extremely high, about 70%. These results highlight the need to clearly understand these different segments (first-time and repeaters) in order to capture new visits and invert the possible tendency of a demand declining destination. Specifically considering visit profiles, the average overnight stay is higher than the average global stay in the Algarve and tourists stay overnight mostly in hotels and rented houses. Their expenses are mainly incurred on accommodation and food and beverages, an important positive result due the intensive labour characteristics of these service sectors.

The individual's average daily expenditure is about £100. This average spend is in line with the general tendency of foreign markets in the Algarve, despite the lack of official data, as stressed in Chapter 6. Two other important results are that visitors tend to spend more money than they expected in the pre-visit, and in winter there is a reduction in the cost of accommodation, mainly due to seasonality effects on prices.

The search for information about the Algarve is strongly met by the Internet (mainly the websites of a flight company, Flybe, TripAdvisor or hotel accommodation, as referred to in the opening questions) and friends and relatives WOM. The return intention is high as well as the intention to recommend. Visitors demonstrate overall good satisfaction with the destination. Bookings are normally made two months in advance, and visitors normally stay overnight in the Algarve. It is possible that a small number, about 4%, do not stay overnight in the Algarve and might opt for an accommodation in neighbouring Spain.

Regarding the five open-ended questions included in the questionnaire, it was possible to conclude that the decisive factors to visit the Algarve are linked to the climate and the accommodation, being the Algarve identified as a family holiday destination. This type of tourist looks for a destination with suitable accommodation in terms of facilities for families, or cheaper solutions in order to spend more time on holiday. The atmosphere is an important factor mentioned and could be used in branding strategies, namely, expressions regarding the way of live, the amazing scenery and the language. The references concerning a safe environment, unspoilt and known as a holiday area, could be explored for a branding strategy. The friendliness and closeness to the UK (easy access) are important issues. As a result, all these noted words could be used in different contexts to promote the Algarve as a tourism destination.

Concerning destinations in competition with the Algarve, attention must be paid to the south of Spain, some other regions of Portugal and France, particularly the south Mediterranean. However, tourism is in fact a globalised sector, and a total of 57 countries were mentioned by the interviewees as possible substitute destinations of Algarve.

Regarding the Algarve's stereotypical image, there were many references to the climate and natural resources, such as the beaches, and gastronomy, friendliness and a relaxing atmosphere. These results are consistent with the research of Stepchenkova and Morrison (2008) in which the climate was one of the main attributes referred by the visitors. It also matched references by the visitors of both the cognitive and affective image attributes.

Places of preference in the Algarve's destination image are mainly linked to the Algarve's greater concentration of tourism in the coastline and western municipalities. These references reinforce the findings that tourists do not recognise administrative boundaries as stated by Shaw and Williams (2004) and by UNWTO (2007: 1), which specified that a tourism destination has "physical boundaries" defining its management and "image and perceptions" defining its competitiveness. In the present research the UK tourists that travel to the Algarve from Exeter airport identify places in the Algarve that are linked with the holiday preferences, namely the name of the beaches in the Algarve or the name of the resorts.

<u>Objective 4:</u> To investigate the secondary image (pre-visit) as opposed to the primary image (post-visit) of the Algarve as a destination, by applying models of TDI and testing the differences between pre/post-visit and peak/off-peak seasons.

The question of measuring the pre/post-visit evaluation was methodologically introduced by Martilla and James (1977) in the context of the quality of the services. In the field of tourism it was applied by Wade and Eagles (2003) in the perspective of National Parks, Pike and Ryan (2004) in a positioning strategy, and O'Leary and Deegan (2005: 223) applied it in Ireland as evaluated by the French tourists, stating that "the tourism industry to ensure consistency between the image promoted and the reality at the destination". All these works reinforce the original idea that the more the post visit (primary image) fits whit the pre image (secondary image), the greater the satisfaction and the return intention.

Within this context, the results of the thesis allow measurement of the TDI through structured questions, and to test the differences through the t-test analysis. It concludes that there are significant Algarve image differences between the pre/post-visit variables, specifically in the image attributes regarding with health services, overall security (safety feeling, crime, …), distressing/relaxing factor, nightlife and shopping facilities in superstores and in the overall rating of the Algarve visit. The tourists tend to evaluate in a more favourable way attributes in the pre-visit than in the post-visit, so these attributes reveal a lower performance after the visit experience. These results could highlight fragilities in the destination as the main gaps were found in attributes linked with destination infrastructures firstly created to provide local residents' needs. Such evaluations might express a more positive development and perception in the tourist's country of origin.

The data analysis regarding the open-ended questions reinforce the results of Jani and Hwang (2011) who conclude in their study that the functional attributes are dominant in potential tourists, whereas psychological attributes prevail in post-travel image perception. Jani and Hwang (2011) also mention the importance of measuring the pre/post-visit jointly, as destination image studies tend to measure these two pictures of the image separately, giving an incomplete image of their dynamism. This pre/post-visit categorization follows the designed temporal basis (Jani and Hwang, 2011) studied by authors such as Beerli and Martín (2004); Frías et al. (2008); Sussman and Unel (1999) and Yilmaz et al. (2009). In this context Jani and Hwang (2001: 348) state: "Infrastructures attributes are dominant pre-travel images as compared with environment, which appears to be a post-visit image component". In the case of the Algarve the results of the open-ended questions demonstrate that both in the pre/post-visit the visitors tend to associate the Algarve with its good climate and with intangible issues such as the atmosphere, and ambience, a result that might be induced by the high level of repeat visits. However, the hospitality and the friendliness are more often referred to in the post-visit, possibly due to the direct contact with residents which reinforces a positive attitude. Sussman and Unel (1999) support the idea of analyse the gap between the pre (expectation) and the post-visit (experience) in order to understand tourist satisfaction.

Managing and monitoring these attributes in a strategy of tourism branding and management is crucial, due to the importance assigned to these variables in the Algarve region. Reinforcing the differences between the Algarve's main infrastructures and competitive destinations could be an important factor of differentiation, even more so when the strategy considers the segment of the elderly which is normally more concerned with the health issues as described by Vieregge (1987: 168) as "mature travellers appreciate readily available medical services, safety and comfort amenities like handrails and ramps, as well as entertainment".

Regarding the question of testing the differences between the peak/off-peak, this approach tends to be the first to explore the dimensions of seasonality in the context of image and competitiveness. The results suggest that there are significant differences in the image attributes regarding with quality of services and modern/traditional perspective. The respondents' tend to evaluate in a more favourable way the destination in the off-peak and also to consider it more traditional in that season. These evaluations might express a feeling of less congestion in off-peak periods. Thus visitors are pleased with the services, and evaluate the destination in a more traditional way, possibly due to the fact that in this period the main touristic activities and services are closed, allowing the region to reveal more of its characteristics beyond the mass tourism framework.

Objective 5: To develop an integrated image of the Algarve as a tourism destination.

In this field of research it is common to find the use of several statistical analyses. Jenkins (1999: 14) stated "In many image studies, a combination of statistical methods have been used, including factor analysis followed by multidimensional scaling. Using several different techniques adds to the validity if there is convergence between the results achieved using different analysis". Generally these statistical techniques include descriptive, frequencies, factor analysis, correlation analysis, multiple regressions, multivariate analysis of variance (MANOVA), analysis of variance (ANOVA) or multivariate analysis of covariance.

The present research included descriptive and frequency analysis, from which it was identified that the most valued attributes in UK tourists' image assessment of the Algarve are the climate, the relaxing atmosphere, the natural heritage, the available activities and the pleasant scenery. In addition, are the second-order leading attributes such as local hospitality, gastronomy, hotel quality, quality of services and shopping facilities. The overall classification of the Algarve visit obtains a continuously high evaluation, a result that promotes a generally positive perspective.

In a broader context, and measured through factor analysis, it was furthermore possible to capture a global image of the Algarve based on a psychological functional perspective, which is assumed to be relevant due to the possibility of intervening in global terms along these factors. The psychological factor, as defined by Echtner and Ritchie (1991) and Gallarza et al. (2001), includes references to attributes mostly connected with destination services. The functional factor mainly relates to attributes concerning destination organization, planning of public spaces and animation. The economic factor was considered separately and, as a unique attribute factor, the climate. This latter one is the factor most mentioned for the attractiveness of the Algarve and does not allow any aggregation with other variables.

It is evident that the factor referred to as psychological includes leading valorised image attributes, explicitly available activities, local hospitality and gastronomy. The functional domain contains two leading value-image attributes, namely natural heritage and hotel quality. These are image attributes that should be carefully considered if image management opts to act, respectively, from a psychological or functional destination perspective.

The evaluation of the Algarve image considers a mix methodology that enables to capture the overall destination image that "clearly highlight the need for research which combines qualitative and quantitative methods" as defended by O'Leary and Deegan (2002: 223). The use of both qualitative and quantitative were introduced in order to fully explore the phenomenon, test and develop a new instrument in TDI measurement and overcome the weaknesses of a single research design considering the multidimensionality of tourism destination. The use of both methods follows the recommendations of the literature review namely Echtner and Ritchie's (1991) guidelines. The final framework although complex and time consuming captures the different dimensions of TDI and the factors that mostly influence it.

<u>Objective 6:</u> To analyse whether first/repeat visitors and variable image modification have an impact on travel behaviour and visitor profiles.

About image modification the results reveals differences between first-time and repeat visitors travel behaviour, related to the type of accommodation chosen and the return intention in summer, and with the demographic characteristics of visitors' age.

With a particular focus on the age characteristic, it should be emphasized that the results demonstrate a higher percentage of young visitors among first-time than repeat visitors, a result that, if consistently generalized, might represent an opportunity to retain new and younger clients and, consequently, produce an inversion to the balance of the Algarve having a dominant mature destination perspective.

About image modification the results reveals differences in the variables regarding booking behaviour, return intention in summer, friends and relatives recommendations and first-time/repeat visitors. These results follow the concerns of several authors as Beerli and Martín, 2004; Chi 2010 and Fakeye and Crompton, 1991. As referred by Chi (2012: 20) in the context of first-time and repeated visitors "it is necessary to develop different marketing strategies and tourism activities tailored to the needs of novice and experienced travellers", a conclusion supported by the differences between these two groups found the results of her study.

Keeping the focus on image, other main conclusion within this objective's fulfilment is based on the fact that image changing for the worse is low among first-time visitors and even lower among repeaters. With the region benefiting from well-establish image perceptions – 66.9% of repeaters and 42.7% of first-time visitors maintained their image – there is still space for improvement, most particularly among first-time visitors. For these tourists who are on their first visit to the Algarve, they revealed having changed their image perception for the better more frequently than repeat visitors, a result that enhances image management as a strategic instrument for tourism flows creation (first visit) and consolidation (repeat visitors). These results are in line with the considerations of Beerli and Martín (2004), which defend the existence of differences between the “first-timers” and the “repeaters”. The results are consistent with Fakeye and Crompton’s (1991: 15) conclusions, particularly their statement that “the results support for the notion that experience with the destination changes images”.

<u>Objective 7:</u> To propose measures to enhance destination branding and management practices based on the findings of this study.

The literature review and the global model’s application allowed to identify the main tendencies and differences in the Algarve’s image assessment among UK tourists. A major finding rests on the fact that the most evaluated attributes of the Algarve’s image reveal a lower performance after the visit experience, raising a preoccupation with global-visit image value, whose difference has a negative gap. Being also coincident with the stereotypical image of the region, and in a context of growing competitiveness between destinations with similar products and facilities, these negatives gaps, if allowed to continue through the years, might cause a systematic decline in overall satisfaction and compromise the destination’s attractiveness and competitiveness in the medium and long term. This is a result that must be taken into consideration within measures taken to enhance destination branding.

Due to the high level of Algarve seasonality demand flows, the results demonstrate difference in two attributes of the peak/off-peak seasons, specifically the quality of services and the relation of modern/traditional. UK tourists are more pleased with the quality of services in winter than during the summer. As noted, more time to deal with the client, less roads congestion and more “intimate” restaurants are hypotheses that may sustain this difference. The region itself changes its perceived image from modern to more traditional from peak to off-peak season. This should not be considered a negative result, it just reveals a difference in perceptions, whose inclusion may be used in target-promotion segments allocated to each season.

All these conclusions can be considered along with the initial perspective of the research acquired during the semi-structured interviews with regional tourism stakeholders. With this contextualization, it is possible to conclude that three major measures should be undertaken to enhance destination branding and management practices and thus improve competitiveness strategies:

1. It is fundamental to involve the different stakeholders in brand management, which must be associated with a comprehensive business strategy considering supply and demand. It is important to establish psychological links with the Algarve as a brand, a practice to be implemented in which the most important image attributes play a crucial role. In this process, the high number of repeaters could help to capture/work the emotional links with the Algarve, acting simultaneously as an important agent in word-of-mouth communication. It is also important to work the Algarve's brand with the Portuguese brand in order to transmit a coherent destination message. These considerations emerge from the stakeholder interviews, namely the issue regarding Destination Image Making, within the discussion about the financing dimension and the entities that should be selected to promote the Algarve as a destination. The stakeholders express the need of the Algarve´s destination image to be managed in partnership with the national strategy and the fact that the affective image is very important in the pre-image. It is essential to create/transmit an image that occurs in the consumer's mind and enables the consumer to decide.

2. The main destination competitors should be monitored, particularly the Malaga region in the south of Spain. The excellent perspective of the quality of the sun and sea product should be extrapolated to other products and sectors throughout the year, stressing the feelings of pleasure, quality

and value for money. In this context, regular direct flight connections are crucial and the expression “closeness to the UK” should be emphasized.

The Algarve’s destination image must be continuously monitored, not only in the most important market, which is the UK, but also in other priority markets. Nowadays, the reality changes fast, and preconceived ideas (stereotypical image), expectations, tourism satisfaction, affective image and decision-making processes are a group of factors that should always be taken into consideration in image analysis as a way to support better image formulation and consequently better destination competiveness. These important tasks are in line with the stakeholders’ views regarding the Algarve destination and the need for competitiveness improvements. They are also coherent with the position and findings of authors such as Lawson and Niven (1994), Enright and Newton (2005), Wolfe and Kang (2004), Kozak (2002), Yoon (2002) and Bahar and Kozac (2007), which defend the need to quantify variables regarding competitiveness. This continues the work of Hankinson (2004) which compare different tourism destinations in the context of positioning, aiming to provide inputs to a better understanding of destination competitiveness.

7.3 Key Contributions

The importance of TDI to the tourism industry and to destination competiveness is well documented in the literature. The research in this field benefits from multiple contributions, being nowadays able to support comprehensive knowledge about its conceptualization and dimensions, formation process, measurement, importance and implications for destination choice and satisfaction, all analysed in the context of socio-demographic variables, among others. This research appears to be one of the first to offer a conceptual framework that links together destination image/destination branding and destination competitiveness in different periods of time, namely the pre/post-visit and peak/off-peak visitation. Although it is possible to find studies regarding destination image which consider the pre/post-visit, namely the influential works of Pearce (1982), Phelps (1986), Wade and Eagles (2003), Pike and Ryan (2004), O’Leary and Deegan (2005) and Yilmaz et al. (2009), this research seems to be pioneering in introducing in the same model the questions of seasonality, defended by Chi and Qu (2008), and visitor satisfaction applied to a specific destination. It is also the first to measure the differences between these periods of time assuming as a case study a mature destination specialized in the sun and sea product.

This research seeks to contribute to the theoretical and methodological fields, adopting TDI concepts to the study of destinations. As stated by Leisen (2001: 62), the "tourism destination marketing literature could greatly benefit from a standardized image measurement tool".

Particularly, the model of analysis contains image variables specifically collected considering destination characteristics and market analysis but, simultaneously, it is an open model able to be adapted to other destinations' image destination analysis. This model and the main findings could help to enhance the understanding of important variables to be considered in a model of destination image measurement and its influential factors, in order to promote better management practices in destination management and branding.

It is also considered a key contribution of the research the option for a mixed methodology to analyse TDI as a tool for destination management and branding. Although the contributions to the field of tourism are numerous, as noted in Table 2.2 there have been few that consider the variables from the perspective of stakeholders' practices of management. This framework enables to prioritize management practices according to the importance of the variables and to understand the main strengths and weaknesses of a destination. It is demonstrated the link between destination image and tourist behaviour in terms of the decision process and travel patterns.

The use of Likert scales transformed into proxy-to-continuum scales (ruler) seems to be an important innovation in measurement in destination image studies, as this enables more detailed observation of interviewees when compared with a standard Likert scale, granting increased power to the statistical tests performed (factorial analysis and independent sample t-tests).

Finally a note about the semi-structured interviews which made an important contribution to the model's construction and to the understanding of the Algarve key questions in terms of management and competitiveness. Within this context, the key inputs put in evidence contributions for the main areas categorized, namely: tourism destination management issues, destination's commercialization and negotiation, economic development, competitiveness aspects, consumer behaviour and segments, destination image-making, the UK market, events/animation, low-cost airlines, tourism in high and low seasons.

7.4 LIMITATIONS

As in any research, the present work has some limitations and there are some new developments that could be investigated. The questionnaire's administration, regardless of the excellent tourist collaboration, was time-consuming and sometimes very stressful, due to the access restrictions to the airport and particularly to visitors in the pre-visit (baggage-claim) area.

The research has utilised the free elicitation method through several open-ended questions, producing data that supported some of the key findings. Although this method provided important inputs to capture the "salient images of the destination", it has some limitations. Kastenholz (2002) states that the measurement of open-ended questions' data is not easy due to the difficulty of some interviewees expressing their opinions and being prone to focus on stereotypes and a reduced number of dimensions. As a result, some of the findings need to be considered with precaution and used in the context of a larger study, namely global tendencies in branding messages. Other methods could be applied to capture the salient aspects of destination, namely in-depth interviews or the focus group, which could provide other information pertinent to the understanding of this subject. However this would be impracticable to manage considering the large amount of data to be collected in a parallel scenario within the thesis.

Self-administrative questionnaires were undertaken considering the limited time that the visitors spent in the check-in area and in the baggage claim. As it was not possible to control the completion of all questionnaires, this could contribute to more missing values when compared for instance with the researcher administered questionnaires.

The data collected in the present study may not be generalized beyond this population as the sample was collected in a convenience method and the study considers only the main foreign market in the Algarve. It is possible that different markets could be conducive to different findings and different strategies. For this reason and although it is recognised the existence of numerous studies regarding destination image dimensions and its influential variables, widely referenced along the research, it was consider to not overstress the discussion of the different findings, mainly due to the different realities studied, different destinations with different markets and the inherent risk of non-comparable data.

7.5 Future Research

Assuming the role of destination image in branding and competitiveness strategies as a continuous process, the research in this field constitutes an up-to-date knowledge facing new challenges and progresses. As expressed by Kneesel et al. (2010: 69), “Destination branding is a tool that can be used by destination marketers to attract visitors or gain a competitive advantage over similar destinations”. As a tool, it is something to be applied and (re)developed in a continuous process, with the results interpreted as guidelines and not as permanent and definitive solutions.

In terms of future research, it is extremely important to continue to measure TDI in different periods of time, to clearly understand if the input variables change over time and if the destination maintains the same levels of attraction and satisfaction. Future research could consider other models continuously integrated in the literature about this thematic and other variables namely due to lifestyles changes.

Future research on the role of DMOs in the context of destination image making and branding could be extremely important in order to improve practices of management. The research in this area is minimal and normally based on reports and management “by the book”. Evaluation of the implementation of different strategies and management practices would be extremely useful to capture eventual different dimensions of this framework. It might be possible to integrate more variables regarding destination competitiveness, namely questions related to competitive destinations with similar products and, in an attempt to identify differential elements, it is important to link image structure and the main influential aspects of image to the corresponding marketing actions.

As defended by Pike and Ryan (2004: 340), it is important to continue to study a destination’s competitive position from a “demand perspective in a travel context”, and then compare this position with the one projected by DMOs and Regional Tourism Organizations.

This study considers the segments of tourists and stakeholders. The study of residents’ perceptions of tourism should cumulatively be considered as a future research, assuming as mentioned by Leisen (2001: 62), “the role residents play in shaping tourists’ perceptions of a destination”.

Due the importance of the Internet and WOM as sources of information, it is important to improve the work in this field. As expressed by Chi (2012: 21), “the internet offers [a] great opportunity for customizing destination offerings and cultivating destination loyalty”. This author defends different marketing strategies for first and repeat tourists, “with different tourism options available for their choices”. The Internet could give important input to a database about tourists’ different booking and information options. Finally, and as defended by Kneesel et al. (2010: 68), it is crucial to continue the study of actual and potential tourists’ destination images in order to continuously construct and evaluate brand strategies as a destination competitiveness instrument.

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APPENDICES

APPENDIX 1

STAKEHOLDERS SEMI-STRUCTURED INTERVIEW SCRIPT

QUESTIONS ABOUT TOURISM DESTINATION IMAGE AND BRANDING FOR STAKEHOLDERS

I am a research student in Management at the University of Exeter Business School and I'm developing my thesis about destination branding and image. I would like to ask you some questions related to the role assumed by your Destination Management Organization and the private sector for the creation of a tourism destination brand and the management of a tourism image.

1. QUESTIONS ABOUT THE UK MARKET

1.1) Do you think investment in the UK market is important to the Algarve? Why?

1.2) What is the main idea of the Algarve transmitted in the UK?

1.3) What is the importance of these products to the UK market?

(Please indicate in %)

MICE _____________

Sun and Sea _______

Golf ______________

Wealth ____________

Cultural ____________

Other ______________

Total _______________

1.4) How has the Algarve's promotional budget for the UK market evolved in the last 10 years?

1.5) What is the positioning of the Algarve in the global market? And in the UK?

1.6) What is the target market for the UK, e.g. in terms of the profile of tourists (age, group composition, booking profile, kind of accommodation, special needs, preferred months to travel, when they book, main motivations, economic position and social status)?

1.7) Are there any studies related to the habits and profiles of UK tourists who travel to the Algarve?

2. ABOUT COMPETITIVENESS

2.1) In your opinion, which are the destinations that compete with the Algarve? Now and in the future?

2.2) In your opinion, what steps could be undertaken by the private and public sectors to develop the Algarve's competitiveness? Could you give me some examples?

2.3) What aspects differentiate or could differentiate the Algarve from other tourist destinations?

2.4) In your opinion, what are the main targets that could be developed for the Algarve, e.g. age, gender, family composition? In what segments could the Algarve be more competitive?

3. About the Economy and General Impacts of Tourism

3.1) Can you please state positive aspects associated with the Algarve in general?

3.2) And negative aspects?

3.3) What are the main elements of attractiveness of the region?

3.4) How would you classify the Algarve's infrastructure in general?

3.5) Could you list some strengths and weaknesses of transportation facilities to the Algarve by road, train, air and sea (cruises)?

3.6) And what specifically about air transport? Strengths and weaknesses?

3.7) What are the main strengths and weaknesses of the tourism workforce?

3.8) In Portugal, and specifically in the Algarve, do you think there exists a link between tourism and other economic activities? If no, do you think there should be? How?

3.9) In the case of negative impacts of tourism, are there any contingency plans?

3.10) In your opinion, what is the main positive contribution of tourism to the development of the Algarve?

3.11) What is the worst contribution?

3.12) Are there any projects and activities that connect tourism with the community (residents)?

4. About Policy and Destination Management (In General)

4.1) How would you describe the networking between different entities related to tourism in the Algarve?

4.2) What do you think are the main effects of national tourism policy on the Algarve region?

4.3) Are there any entities that Analyse tourism experience and tourism satisfaction?

4.4) What are the main strengths and weaknesses of the organization of the tourism sector in the Algarve? Do you feel there is a need for any other organization? If yes, what are the most important activities to develop? What kind of alliances could be created to develop tourism in the Algarve?

5. About Image and Branding

5.1) If I ask you for a statement that could identify the Algarve to a foreigner, what would you say?

5.2) In your opinion, what is the general image of the Algarve?

5.3) Are there any monitoring indicators of messages sent out regarding the Algarve via the Internet, (social) media etc.?

5.4) What is your opinion of service supplies in the Algarve (hospitality, main attractions, transport)? For example, quality, price, value for money, localization…

5.5) Regarding entertainment, what is the best way to develop it? What kind of events would be more appropriate to project the Algarve's image? Could you give some examples?

5.6) Are there any sub-brands in the Algarve? Please state what they are.

5.7) How is the Algarve brand used in the context of other factors/products besides tourism?

5.8) Are there any groups or institutions that manage the Algarve brand? What resources are applied to the management of the Algarve brand?

6. About Promotion and Channels of Communication

6.1) In your opinion, what kinds of resources (natural attractions, historical…) are most important to the development of the Algarve as a destination?

6.2) In general, what are the main resources (attractions) used in the promotion of the Algarve? How are they selected?

6.3) What about the products offered (promoted) to the UK market? Are they different from other markets? Can you give me some examples?

6.4) How are strategies of promotion organized and structured regarding the Algarve for the UK market?

6.5) In terms of promotion, how do you describe the articulation between the different organizations? What would be the best way to develop this articulation?

6.6) In your opinion, how should we promote the Algarve and its attractions? Please state some ideas that could identify the Algarve internationally.

6.7) How do you manage contacts regarding the promotion and commercialization of the Algarve? Which are the best channels? Tour operators, Internet, travel agencies… ?

6.8) What are the main difficulties in commercializing the Algarve as a destination?

6.9) If you had to distribute the total budget for promotion available in Portugal, how would you distribute it between the different markets? And regarding the Algarve?

6.10) In what areas has a promotional budget been applied (e.g. events, public relations, publicity…)? Can you give examples?

6.11) Do you think the total amount is enough? If not, how much do you think would be enough? Why?

Appendix 2

Preliminary Semi-Structured Interview to Questionnaire Conception

Questions about tourism destination image and branding to be applied to potential tourists

(Pre-visit and preparation of a pilot test)

Hello, thank you for coming. My name is Maria Custódio. I am a research student in Management at the University of Exeter in the UK and I'm developing a thesis about destination image measurement as a support tool for the construction and definition of destination branding and competitiveness. In other words, what I'm trying to understand are people's holiday decisions and habits.

QUESTIONS ABOUT THE PAST:

CAN YOU TELL ME MORE ABOUT YOU?

1) Where did you grow up? Your family composition. Age and job?
2) What were your family holidays like? The kind of places you used to visit. Likes and dislikes. Why?
3) Have you ever been abroad? What age were you when you first travelled abroad?
4) Where did you go?
5) In which periods did you normally travel?
6) Who decided?
7) Who booked?
8) Influences of friends and relatives?

NOWADAYS:

9) And nowadays is it different?
10) What kinds of activities/things do you like to do on holiday?
11) Which kind places do you prefer (beach, countryside…)? Why?
12) How much do you know about a destination before you visit?
13) Whom do you normally travel with?
14) What kinds of information do you consult before you decide to go on holiday or to a special place?
15) Which kinds of information are more important to you in order to know about a place?
16) Who books the holiday?

17) If you, how do you manage or make the booking? Can you explain the process to me?

18) Have you ever heard of Portugal?

19) Regarding Portugal, what is the first image or statement that comes into your mind when you think about Portugal?

20) And before you came was it different? Why?

21) Have you ever heard of the Algarve?

22) Have you ever visited this region?

23) And when you think about the Algarve, what image comes into your mind? *Or* Have you ever visited the Algarve on holiday?

24) And before, was it different?

25) Do you have an image of the Algarve in the summer season? What aspects – words, images, emotions and sensations – come into your mind?

26) What about in the winter season? Is it different?

27) Have you ever considered travelling or returning to the Algarve on holiday? Why?

28) If yes, what months of the year or holiday times (e.g. Christmas, Easter, summer holidays etc.)? Why?

29) If you thought about taking a holiday to a destination such as the Algarve, what other destinations would you also consider?

30) What aspects could differentiate the Algarve from other tourism destinations?

31) If I ask you to give me a statement, a phrase, that could characterize the Algarve, that would best describe the Algarve, what would you say? In other words, what is your global image of the Algarve?

32) Can you please state three positive aspects that you associate with the Algarve?

33) And three negative aspects?

34) Besides holidays and tourism, what other aspects come into your mind when you think about the Algarve and Portugal?

Appendix 3

Questionnaires Pre/Post-Visit

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Bagagem

Date of the collect:______/__________/__________Male:________ Female: ________

Theme 1 - Visit Characterization

1. Is this your first visit to Algarve?

1.1 Yes ☐ 1.2 No ☐

2. If no, how many times have you visited before?

____

3. Besides the Algarve, which other destinations have you also considered (excluding the Algarve):

3.1 ____

3.2 ____

3.3____

4. Please mention the decisive factors that led you to choose the Algarve for holidays (and not other destinations)?

4.1____

4.2 ____

4.3____

5. How many years ago did you first hear about the Algarve?

5.1 Less than 1 year ☐

5.2 More than 1 year ☐ How many?______________

6. During this visit will you stay overnight in Algarve?

6.1 Yes ☐ 6.2 No ☐

6.1 If yes, for how many nights and in which type of lodging?

6.1.1 Nº of nights: ☐

6.1.2 Hotel or another type of classified lodging (aparthotel, holiday complex, etc.) ☐

6.1.3 Own House ☐

6.1.4 Rented House ☐

6.1.5 Friends or Relatives House ☐

6.2. In what place/town will you stay?

____

7. Where did you obtain information (get inspired) about the Algarve? *(Choose five maximum and mark your opinion with an X)*

7.1 Internet in general... ☐
7.2 Friends and relatives recommendations................. ☐
7.3 Advertisements (magazines, television, leaflets) ... ☐
7.4 Guidebooks .... ☐
7.5 Other books and films .... ☐
7.6 Travel agencies / Airline / Hotel website .... ☐
7.7 TV Programmes .... ☐
7.8 Tourist Information centre (including the website of the region) .... ☐
7.9 Embassy, consulate .... ☐
7.10 Tour operator brochures .... ☐
7.11 Social Web (blogs, facebook, etc) .... ☐
7.12 Web-communities (TripAdviser...) .... ☐
7.13 A previous visit .... ☐
7.14 Other. Which? __________________________ ☐

8. When did you make your reservation(s) for this trip? *(Please state the month/year)*

____

9. Which means have you chosen to make the reservation(s) in this trip: *(Choose only one and mark with X)*

9.1 Travel Agency.. ☐
9.2 Internet... ☐
9.3 Friends and relatives.. ☐
9.4 Telephone... ☐
9.5 Other. Which?____________________________ ☐

10. Please mention three websites that you considered helpful in obtaining information about the Algarve

10.1____

10.2 ____

10.3 ____

11. For this visit, who decided to come to the Algarve?:

11.1 Myself.. ☐
11.2 My partner/husband or wife................................. ☐
11.3 I suggested and we decided jointly in family.......... ☐
11.4 My partner/husband or wife suggested and we decided jointly .... ☐
11.5 The children/my sons decided .... ☐
11.6 Some friends decided .... ☐
11.7 Other, please state .... ☐

13. Do you intend to return to Algarve in the summer as a tourist in the next 5 years *(Choose one option and mark with X)*

13.1 Yes ☐ 13.2 No ☐

14. Do you intend to return to Algarve in the winter as a tourist in the next 5 years *(Choose one option and mark with X)*

14.1 Yes ☐ 14.2 No ☐

15. Have you recommended the Algarve to your friends and relatives *(Choose one option and mark with X)*

15.1 Yes ☐ 15.2 No ☐

1

Theme 2- Region Characterization

16. Please indicate below your expectations of the Algarve?

	Please mark with an X your opinion (anywhere over the ruler) *(in Cm.)*	Don't know (?) / Not applicable
16.1 Public transportation (availability, coverage)	Very Poor — Very Good	?/NA ☐
16.2 Level of prices	Very Poor — Very Good	?/NA ☐
16.3 Value for money	Very Poor — Very Good	?/NA ☐
16.4 Local hospitality	Very Poor — Very Good	?/NA ☐
16.5 Quality in services (in shops, transport, public services, restaurants)	Very Poor — Very Good	?/NA ☐
16.6 Signposting (in the roads, main attractions…)	Very Poor — Very Good	?/NA ☐
16.7 Nightlife	Very Poor — Very Good	?/NA ☐
16.8 Entertainment (including events)	Very Poor — Very Good	?/NA ☐
16.9 Natural Heritage (beaches, others)	Very Poor — Very Good	?/NA ☐
16.10 Overall security (safety feeling, crime,…)	Very Poor — Very Good	?/NA ☐
16.11 Heritage and cultural events (monuments, museums, others)	Very Poor — Very Good	?/NA ☐
16.12 Gastronomy (eating out)	Very Poor — Very Good	?/NA ☐
16.13 Urban cleanliness	Very Poor — Very Good	?/NA ☐
16.14 Shopping facilities in Local Retail (Centres)	Very Poor — Very Good	?/NA ☐
16.15 Shopping facilities in superstores	Very Poor — Very Good	?/NA ☐
16.16 Tourist information	Very Poor — Very Good	?/NA ☐
16.17 Land Use Planning	Very Poor — Very Good	?/NA ☐
16.18 Public Spaces Conservation (well kept buildings)	Very Poor — Very Good	?/NA ☐
16.19 Climate	Very Poor — Very Good	?/NA ☐
16.20 Available Activities (ex. nautical sports, golf, kite surf, children activities, others, …)	Very Poor — Very Good	?/NA ☐
16.21 Public Accessibilities (is it easy to reach different places?)	Very Poor — Very Good	?/NA ☐
16.22 Health Services	Very Poor — Very Good	?/NA ☐
16.23 Hotels Quality	Very Poor — VeryGood	?/NA ☐
16.24 Overall, how would you rate your visit to Algarve?	Very Poor — Very Good	?/NA ☐

17. How would you expect the Algarve to be (atmosphere, lifestyle, people, experiences, your emotions) concerning these aspects?

Please mark with an X your opinion (anywhere over the ruler) *(in Cm.)*

			Don't know (?) / Not applicable
17.1	Distressing	Relaxing	?/NA ☐
17.2	Modern	Traditional	?/NA ☐
17.3	Unpleasant	Pleasant	?/NA ☐
17.4	Arousing	Sleepy	?/NA ☐
17.5	Gloomy	Exciting	?/NA ☐
17.6	Artificial	Natural	?/NA ☐
17.7	Overcrowded	Exclusive	?/NA ☐

18. How many times do you travel per year? ☐

18.1 In which period(s)? *Please mark with an X your opinion(s).*

18.1.1 Summer .... ☐
18.1.2 Christmas / New Year .... ☐
18.1.3 Carnival .... ☐
18.1.4 Easter .... ☐
18.1.5 Other. Please state: ____________________ ☐

19. Please, mention three key words that you associate with the Algarve:

19.1 ____

19.2 ____

19.3 ____

Theme 3 - Personnal and Demographic Information

20. Age ________

21. Are you travelling alone OR with your family or friends? How many people are in your party?

21.1 Alone ☐

21.2 Number of people (including yourself) ☐

22. If travelling with other people who are you travelling with?

22.1 Travelling with family/with children ☐
22.2 Travelling with partner/husband or wife ☐
22.3 In an organised group tour ☐
22.4 Travelling with friends, colleages ☐

23. Please, state the ages of the group:

☐ ☐ ☐ ☐ ☐ ☐

24. On this visit what would you expect your average daily spend would be? (including accommodation, food&drink, fuel purchased and others; excluding airfare): ☐ €

25. How much do you expect to spend on the following items:

25.1 Accommodation.. %
25.2 Food & Drink.. %
25.3 Internal Transports.. %
25.4 Shopping (Clothes, Souvenirs, Decorations, others)...... %
25.5 Entertainment .... %
25.6 Others .... %

26. Personal Qualifications:

26.1 No college.. ☐
26.2 Some college / associate degree .... ☐
26.3 Bachelors degree .... ☐
26.4 Post bachelor's degree .... ☐
26.5 Never attended an education institution .... ☐
26.6 Other. Please state: ______________________ ☐

Thank you for your collaboration.
Enjoy your holidays.

3

UNIVERSITY OF EXETER

Check-In

Date of the collect:______/__________/__________Male:________ Female: ________

Theme 1 - Visit Characterization

1. Is this your first visit to Algarve?

1.1 Yes ☐ 1.2 No ☐

2. If no, how many times have you visited before?

____

3. Besides the Algarve, which other destinations have you also considered (excluding the Algarve):

3.1 ____

3.2 ____

3.3____

4. Please mention the decisive factors that led you to choose the Algarve for your holidays (and not other destinations)?

4.1____

4.2 ____

4.3____

5. How many years ago did you first hear about the Algarve?

5.1 Less than 1 year ☐

5.2 More than 1 year ☐ How many?______________

6. During this visit did you stay overnight in Algarve?

6.1 Yes ☐ 6.2 No ☐

6.1 If yes, for how many nights and in which type of lodging?

6.1.1 Nº of nights: ☐

6.1.2 Hotel or another type of classified lodging (aparthotel, holiday complex, etc.) ☐

6.1.3 Own House ☐

6.1.4 Rented House ☐

6.1.5 Friends or Relatives House ☐

6.2. In what place/town did you stay?

____

7. Where did you obtain information (get inspired) about the Algarve? *(Choose five maximum and mark your opinion with an X)*

7.1 Internet in general.. ☐
7.2 Friends and relatives recommendations................ ☐
7.3 Advertisements (magazines, television, leaflets) ... ☐
7.4 Guidebooks .... ☐
7.5 Other books and films .... ☐
7.6 Travel agencies / Airline / Hotel website .... ☐
7.7 TV Programmes .... ☐
7.8 Tourist Information centre (including the website of the region) .... ☐
7.9 Embassy, consulate .... ☐
7.10 Tour operator brochures .... ☐
7.11 Social Web (blogs, facebook, etc) .... ☐
7.12 Web-communities (TripAdviser...) .... ☐
7.13 A previous visit .... ☐
7.14 Other. Which? __________________________ ☐

8. When did you make your reservations for this trip?
(Please state the month/year)

____

9. Which means have you chosen to make the reservations in this trip: *(Choose only one and mark with X)*

9.1 Travel Agency.. ☐
9.2 Internet.. ☐
9.3 Friends and relatives... ☐
9.4 Telephone.. ☐
9.5 Other. Which?____________________________ ☐

10. Please mention three websites that you considered helpful in obtaining information about the Algarve

10.1____

10.2 ____

10.3 ____

11. For this visit, who decided to come to the Algarve ?

11.1 Myself.. ☐
11.2 My partner/husband or wife................................. ☐
11.3 I suggested and we decided jointly in family.......... ☐
11.4 My partner/husband or wife suggested and we decided jointly .... ☐
11.5 The children/my sons decided .... ☐
11.6 Some friends decided .... ☐
11.7 Other, please state .... ☐

12. Has this visit changed your image of Algarve:
(Choose only one and mark with X)

12. 1 Yes, much better than expected.......................... ☐
12.2 Yes, better than expected .... ☐
12.3 No, stayed the same/as expected .... ☐
12.4 Yes, for worse... ☐
12.5 Yes, much worse than expected .... ☐

13. Do you intend to return to Algarve in the summer as a tourist in the next 5 years *(Choose one option and mark with X)*

13.1 Yes ☐ 13.2 No ☐

14. Do you intend to return to Algarve in the winter as a tourist in the next 5 years *(Choose one option and mark with X)*

14.1 Yes ☐ 14.2 No ☐

1

15. Will you recommend the Algarve to your friends and relatives *(Choose one option and mark with X)*

15.1 Yes ☐ 15.2 No ☐

Theme 2- Region Characterization

16. How would you rate Algarve on the following:

	Please mark with an X your opinion (anywhere over the ruler) *(in Cm.)*	Don't know (?) / Not applicable
16.1 Public transportation (availability, coverage)	Very Poor — Very Good	?/NA ☐
16.2 Level of prices	Very Poor — Very Good	?/NA ☐
16.3 Value for money	Very Poor — Very Good	?/NA ☐
16.4 Local hospitality	Very Poor — Very Good	?/NA ☐
16.5 Quality in services (in shops, transport, public services, restaurants)	Very Poor — Very Good	?/NA ☐
16.6 Signposting (in the roads, main attractions...)	Very Poor — Very Good	?/NA ☐
16.7 Nightlife	Very Poor — Very Good	?/NA ☐
16.8 Entertainment (including events)	Very Poor — Very Good	?/NA ☐
16.9 Natural Heritage (beaches, others)	Very Poor — Very Good	?/NA ☐
16.10 Overall security (safety feeling, crime,...)	Very Poor — Very Good	?/NA ☐
16.11 Heritage and cultural events (monuments, museums, others)	Very Poor — Very Good	?/NA ☐
16.12 Gastronomy (eating out)	Very Poor — Very Good	?/NA ☐
16.13 Urban cleanliness	Very Poor — Very Good	?/NA ☐
16.14 Shopping facilities in Local Retail (Centres)	Very Poor — Very Good	?/NA ☐
16.15 Shopping facilities in superstores	Very Poor — Very Good	?/NA ☐
16.16 Tourist information	Very Poor — Very Good	?/NA ☐
16.17 Land Use Planning	Very Poor — Very Good	?/NA ☐
16.18 Public Spaces Conservation (well kept buildings)	Very Poor — Very Good	?/NA ☐
16.19 Climate	Very Poor — Very Good	?/NA ☐
16.20 Available Activities (ex. nautical sports, golf, kite surf, children activities, others, ...)	Very Poor — Very Good	?/NA ☐
16.21 Public Accessibilities (is it easy to reach different places?)	Very Poor — Very Good	?/NA ☐
16.22 Health Services	Very Poor — Very Good	?/NA ☐
16.23 Hotels Quality	Very Poor — VeryGood	?/NA ☐
16.24 Overall, how would you rate your visit to Algarve?	Very Poor — Very Good	?/NA ☐

17. Please, classify Algarve (atmosphere, lifestyle, people, experiences, your emotions) concerning these aspects:

Please mark with an X your opinion (anywhere over the ruler) *(in Cm.)*

				Don't know (?) / Not applicable
17.1	Distressing		Relaxing	?/NA ☐
17.2	Modern		Traditional	?/NA ☐
17.3	Unpleasant		Pleasant	?/NA ☐
17.4	Arousing		Sleepy	?/NA ☐
17.5	Gloomy		Exciting	?/NA ☐
17.6	Artificial		Natural	?/NA ☐
17.7	Overcrowded		Exclusive	?/NA ☐

18. How many times do you travel per year? ☐

18.1 In which period(s)? *Please mark with an X your opinion(s).*

18.1.1 Summer .... ☐
18.1.2 Christmas / New Year .... ☐
18.1.3 Carnival .... ☐
18.1.4 Easter .... ☐
18.1.5 Other. Please state: ____________________ ☐

19. Please, mention three key words that you associate with the Algarve:

19.1 ____

19.2 ____

19.3 ____

Theme 3 - Personnal and Demographic Information

20. Age _______

21. Are you travelling alone OR with your family or friends? How many people are in your party?

21.1 Alone ☐

21.2 Number of people (including yourself) ☐

22. If travelling with other people who are you travelling with?

22.1 Travelling with family/with children ☐
22.2 Travelling with partner/husband or wife ☐
22.3 In a organised group tour ☐
22.4 Travelling with friends, colleages ☐

23. Please state the ages of the group:

☐ ☐ ☐ ☐ ☐ ☐

24. In this visit, what has been your average individual daily spending in Algarve? **(including accommodation, food&drink, fuel purchased and others; excluding airfare):** ☐ €

25. How much did you spend on the following items?:

25.1 Accommodation.. %
25.2 Food & Drink... %
25.3 Internal Transports.. %
25.4 Shopping (Clothes, Souvenirs, Decoration, others) .... %
25.5 Entertainment .... %
25.6 Others .... %

26. Personal Qualifications:

26.1 No college.. ☐
26.2 Some college / associate degree .... ☐
26.3 Bachelors degree .... ☐
26.4 Post bachelor's degree .... ☐
26.5 Never attended an education institution .... ☐
26.6 Other. Please state: _______________________ ☐

Thank you for your collaboration.
Hope you enjoyed your holidays.
Have a safe trip.

3

APPENDIX 4

LETTER REQUESTING QUESTIONNAIRES ADMINISTRATION AUTHORIZATION FROM THE AIRPORT

Dear Sir

...

Faro International Airport

My name is Maria Custódio. I am a PhD student in Management at the University of Exeter, Business School.

I'm developing a thesis about destination image measurement as a support tool for the construction and definition of destination branding and competitiveness. This study considers British tourists that travel to the Algarve in the low and high seasons. I'm trying to understand some people's holiday decisions and habits in the context of the different seasons.

To fulfil my objectives I will need to conduct a questionnaire with British tourists, when they arrive at Faro airport, and again when they leave (pre/post-visit) in the off-peak and peak seasons. What I would like to ask is if the airport could give me authorization to conduct questionnaires, to a schedule, at the boarding gate or in the bars and restaurants. I know Flybe have flights to the Algarve between April to October so I could apply a mid-winter season questionnaire and then one in summer.

This information would be extremely important for the development of my work. Also, if the airport has any questions that it wants answer to now, I will be happy to introduce and Analyse information for the airport and share my results with you.

I hope to receive a positive answer,

Kind regards,

Maria João Custódio.

APPENDIX 5

LETTER REQUESTING TO BOOK INTERVIEWS

Dear <<name>>,

I am a PhD student at Exeter University, United Kingdom and I'm working on a PhD dissertation regarding tourism destination image as a knowledge tool for brand definition. The case study is applied to the UK market and to the Algarve as a destination. I would like to apply mix methods, namely questionnaires and interviews. In this context, I would like to ask if you if are available to meet me to give some impressions about tourism strategies regarding this market.

I thank you in advance for your attention and I await your answer.

Best wishes,

Maria João Custódio.