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ROBERT GOVERS Virtual Tourism Destination Image

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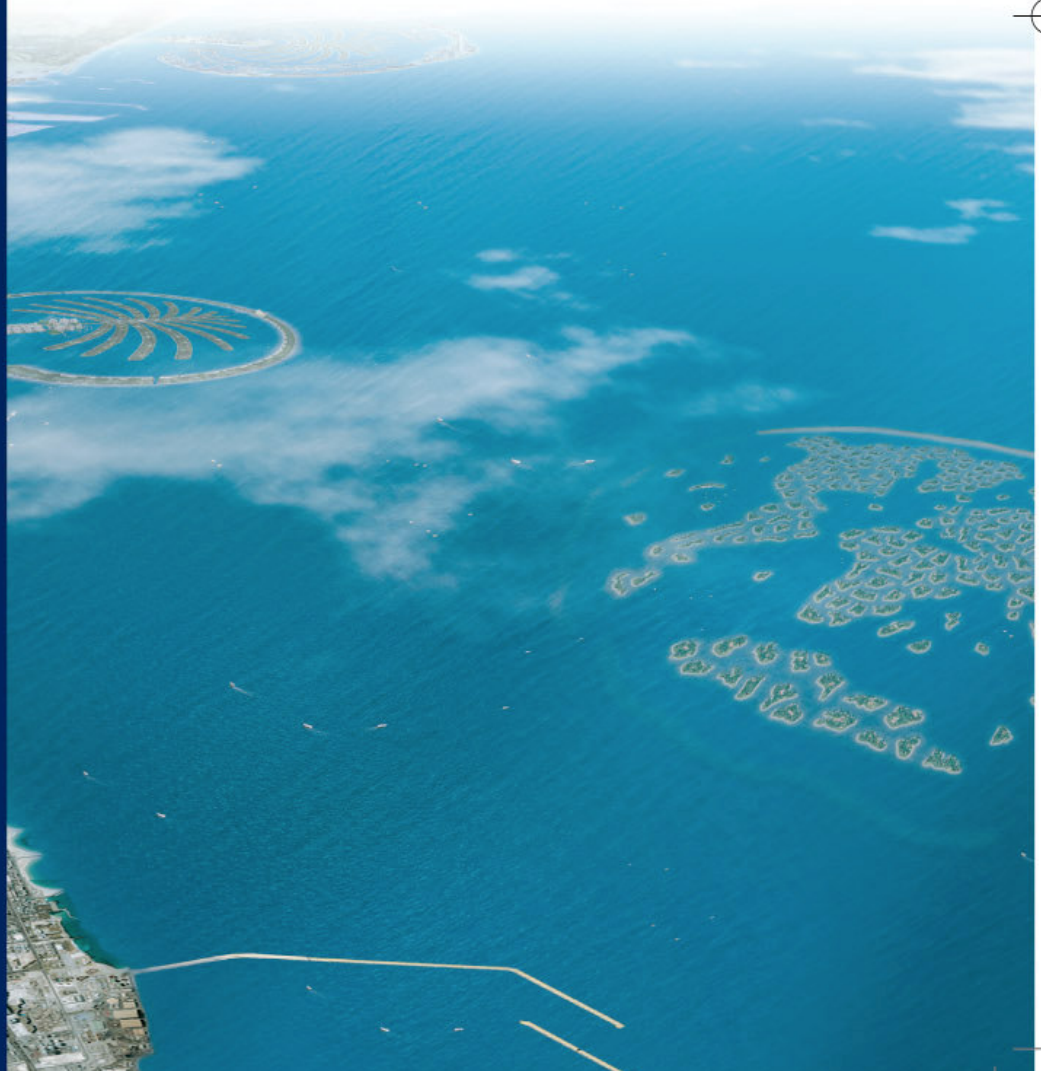
Glocal identities constructed, perceived and experienced



ERIM

VIRTUAL TOURISM DESTINATION IMAGE:
Glocal identities constructed, perceived and experienced

Het virtueel imago van toeristische bestemmingen:
Glokale identiteiten construeren, percipiëren en beleven

Proefschrift

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Voor Mariska, mijn aankomst
Voor Rosa en Hans, mijn toekomst

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Many people believe that one must be in some way mentally disturbed to engage in writing a doctoral thesis, particularly in the way I did, part-time, i.e. either between 4 and 8 AM or 7 and 11:00 PM, before or after *work*, in isolation and for a long period of time in a location where access to scientific publications and networks was very limited. I must say, it has not always been easy, but it has always been fascinating and inspiring.

It has been a journey, that did not start with graduation and looking at an advert saying "University Vacancies: Ph.D. Students". It has been a journey that I crafted with the help of many. I have always been a fervent traveller, and I mean traveller, the act of travelling, seeing the world parade in front of you. During childhood, I was a lucky young boy with a single parent mother who did everything she could in order to be able to, at least ones a year, take us on winter sports. How frustrating it must have been for her to see that after weeks of nervous anticipation, my fun only lasted roughly half a day, from departure until arrival in the Alps. At that age, skiing with a bunch of strange kids who speak different languages was a frightening experience and a homeward journey is never fun; going back to the dangers of slipping away into structure and routine everyday life.

Luckily I found a career path that does not quite facilitate such slipping away. This, I owe to my promoter, mentor, coach and friend Prof. Frank M. Go. He has been the one that recognised my interests, unlocked my sources of inspiration and channelled them towards this career. I am forever grateful for the many, many hours that we have spent (and hopefully will spend for a long time to come) discussing tourism research, the academic arena and life in general. It is probably the place where we first met that has catapulted us towards this end result that is in front of you. Do you remember where Frank? The McDonalds in Amsterdam Southeast, tucked away in between head offices of multinational banks, IKEA, the Ajax Arena Stadium and a residential area with an over 60% allochtonous population. Could you imagine a more globalised surrounding? Frank, thank you for everything you have done since that time.

In my travels it was never the pictures of must-see sites - the pyramids of Giza, the Great Wall of China, or the Sagrada Familia - that dominated my mental image library. Rather, scenes of everyday life of local people and surroundings was always what intrigued me most. Frank has gone before me and would probably agree with me that therefore travelling itself is indeed the best part of tourism; because if you arrive in a location, you want to be there long enough to really get to understand the local identity of place, which is when tourism becomes work and everyday life. What a great job we have that we can do this and have done this, for which we are grateful. Therefore, the topic of this book is not a coincidence, but it is probably also the reason why, already at roughly the age of twelve, I told my mother and newly acquired father that I would be emigrating to Canada. How thrilled they must have been. Thanks mom and dad for putting up with me, believing in me and for bringing me here.

Now I live in Belgium, not quite as far in distance, but culturally, I am still not so sure. I will probably take the rest of my career here to be conclusive on that. How did I end up here? Two major reasons. My dear wife, the best Flanders has to offer, but whom I had to meet in the Krugerpark of all places, and who has always promised me the earth (literally), probably deep inside herself induces some sort of gravitational force that pulls us towards this spot on the globe where people tend to have life treat them well. Thank you Mariska for keeping my feet on the ground and for all your support and love; and thank you for

being such a wonderful (virtually single parent) mother to Hans and Rosa. With them I have to apologise myself for not having been as much of a father as I could have been; daddy's 'big job' is finally complete. In addition I need to thank Prof. Myriam Jansen Verbeke for bringing us to Belgium and for helping me in my career. If it was not for her, we would probably have been in Australia now; not quite Canada, but who is counting?

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May our journey continue…

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1 INTRODUCTION

> *We are ruled by extravagant expectations:*
> *(1) Of what the world holds. Of how much news there is, how many heroes there are, how often master pieces are made, how exotic the nearby can be, how familiar the exotic can become. Of the closeness of places and the farness of places.*
> *(2) Of our power to shape the world. Of our ability to create events when there are none, to make heroes when they don't exist, to be somewhere else when we haven't left home. Of our ability to make art forms suit our convenience, to transform a novel into a movie and vice versa, to turn a symphony into mood-conditioning. To fabricate national purposes when we lack them, to pursue these purposes after we have fabricated them. To invent our standards and then to respect them as if they had been revealed or discovered.*
> *…We have become so accustomed to our illusions that we mistake them for reality. We demand them. And we demand that there be always more of them, bigger and better and more vivid. They are the world of our making: the world of the image* (Boorstin 1962: Introduction Section).

In this present day world of parallel virtual and 'real' experiences, our extravagant expectations only seem to escalate. The common saying: "It's a small world after all", rings more true every day. As opposed to Boorstin's query of how exotic the nearby can be, we now ask ourselves how nearby the exotic can be; and not how familiar the exotic can become, but how to preserve the exotic of the unfamiliar. But Boorstin was prophetic when he observed that "Now [in the 21st century more then ever] all of us frustrate ourselves by the expectation that we can make the exotic an everyday experience (without it ceasing to be exotic); and can somehow make commonplaceness itself disappear" (Boorstin 1962: p. 77 [From Traveler to Tourist]).

With technology we have now in fact succeeded in doing so. As Harvey (1989: p. 293) puts it: "The image of places and spaces becomes as open to production and ephemeral use as any other". We have 24/7 access to the exotic world of National Geographic and Discovery Channel, true to life movie experiences, interactive edutainment museums, themed attraction parks, simulators, up to the minute live news from around the globe and, of course, the internet with which we can virtually visit any place on earth from behind our computer screens. We can build social networks and interest groups across time and space; global virtual communities of practice (Wenger et al. 2002) without leaving our house or cave; the most successful virtual community being Al Qaeda (built on "resistance identity" (Castells 1997)).

The way we construct images of places has changed profoundly, both from a supply – projecting of identity – as well as demand – perceiving of images – perspective. As opposed to a one way push process of supply driven mass communication, place identity is now being produced, imagined and consumed through dynamic interactive processes, in physical as well as virtual environments (Molenaar 1996, 2002). That is the area of research that this dissertation focuses on.

1.1 Research Background

As the online population will top 1 billion in 2005 (Computer Industry Almanac Inc. 2004), there were close to 57 million hostnames (over 26 million active websites) serving the internet in December 2004 (up by 24% compared to December 2003) (Netcraft 2004). Many of these websites project images of places and it is highly unlikely that these are all consistent and true representations, as in the information age, place projections are increasingly controlled by a network economy (Werthner & Klein 1999: p. 3) and not in local communities. The network society constitutes the new social morphology for a capitalist economy based on innovation, globalization, and decentralization. Dominant functions in society (such as financial markets, transnational production networks and media systems), are organised around the spaces of flows of capital, information, technology and images, that link them around the world. At the other end, subordinate functions and people, in the multiple spaces of places are being fragmented. Different locales become increasingly segregated and disconnected from each other (Castells 1996: p. 470, 471 & 476).

Thus, the emerging network society raises questions about the expanding digital divide and increasing social exclusion. Rifkin (2001b) has warned us that the migration of human commerce and social life to the realm of cyberspace isolates one part of the human population from the rest in ways never before imagined. Some have argued that our society should safeguard the "human moment", the "high-touch" face-to-face contact between people (Hallowell 1999: p. 64) and to design for infrastructure that integrates the physical and the virtual, as "people enjoy and need social and sensual contact; they do not want to be disembodied" (Huang 2001: p. 149-150). Under conditions of intense competition in rapidly expanding time-focused service industries and increased connectivity of society, Pruyn (2002) also raises the issue of client relationships, which he refers to as the *relationscape* (analogous with the focus on the *servicescape*). He emphasises the importance of interaction processes on the Internet i.e. questions, answers, and follow-up questions (supported by (Molenaar 1996, 2002)). "A dynamic communication process, therefore, whereby the consumer is the 'sender' and 'receiver' of information and who moreover is free to define the time and the pace of the interaction (*self pacing*)" (Pruyn 2002: p. 27). Some have even argued for a "third rationality for information systems in which trust, social capital, and collaborative relationships become the key concepts of interpretation" (Kumar & Dissel 1998: p. 199), because it seems that many indeed feel disembodied as we move from industrial to cultural production (Rifkin 2001b).

> Commerce in the future will involve the marketing of a vast array of [extravagant] cultural experiences rather than of traditional industrial-based goods and services. Global travel and tourism, theme cities and parks, destination entertainment centres, wellness, fashion and cuisine, professional sports and games, gambling, music, film, television, the virtual worlds of cyberspace and electronically mediated entertainment of every kind are fast becoming the centre of a new hyper-capitalism that trades in access to cultural experiences. The metamorphosis from industrial production to cultural capitalism is being accompanied by an equally significant shift from the work ethic to the play ethic. The Age of Access

> is about the commodification of play - namely the marketing of cultural resources including rituals, the arts, festivals, social movements, spiritual and fraternal activity, and more. Transnational media companies with communications networks that span the globe are mining local cultural resources in every part of the world and repackaging them as cultural commodities and entertainment…. The capitalist journey, which began with the commodification of space and material, is ending with the commodification of human time and duration. The selling of culture in the form of paid-for human activity is quickly leading to a world where pecuniary human relationships are substituting for traditional social relationships (Rifkin 2001a: § 7,8,11).

As the online elite produce ephemeral images of places, spaces, and cultures, the have-nots become increasingly disconnected. It even seems that the extravagant expectations of those that 'have access' lead to even more extravagant terrorist actions as we become increasingly inoculated to the daily catastrophes that our world endures. What does it take these days for those on either side of the divide to feel connected and to be awe inspired? In promoting tourism and place image in a globalised yet divided world should we not return to a renewed focus on identity and human interaction? Because of its geographical location, being at the cross-roads of civilisations; with its modern melting pot of global cultures with an 80 percent expatriate community; as well as its aspiration to become a global hub for tourism, technology and trade in the new economy; the research context within which this research study has been conducted – destination Dubai - should be an interesting one.

Past and present destination image research seems to have focused on measuring place-performance on attributes that define our extravagant expectations with regards to travel. These would include: the perfect climate; the most friendly, multilingual and culturally rich local population; the lowest possible cost; the most accessible yet most exotic location; the most interesting and adventurous or entertaining activities on offer; the best organised tourist infrastructure and highest quality facilities, yet unspoilt and the most attractive natural beauty. Discourse contends that satisfying all these conditions will result in a positive destination image and subsequent preferred ranking in consumers' consideration sets when deciding on their next travel destination. But is not there more to this (See sections 2.4 and 4.2 / 4.3)? In this post-modern era, should one not be looking for differences, subjectivity, social contact and otherness (Harvey 1989)?

1.2 Research Relevance

Technological advancement and increased international competition thus affect the way in which tourism destinations are imagined, perceived and consumed. Creating destination image is no longer a one-way 'push' process of mass communication, but a dynamic one of selecting, reflecting, sharing, and experiencing (Molenaar 1996, 2002). Tourism is indeed often referred to as a hedonic consumption experience (Vogt & Fesenmaier 1998), which "designates those facets of consumer behaviour that relate to the multisensory, fantasy and emotive aspects of one's experience of products" (Hirschman & Holbrook 1982: p. 92). With experiential products like travel and tourism, the consumption experience is an end in itself and the planning of a trip is an ongoing enjoyable and

interactive social process, where fantasy and emotions also play an important role and consumers are involved in ongoing information search (Decrop & Snelders 2004). By going through this process and collecting all this information, the consumer creates an 'image' or 'mental portrayal or prototype' (Alhemoud & Armstrong 1996; Crompton 1979; Kotler et al. 1993; Tapachai & Waryszak 2000: p. 37) of what the travel experience might look like. Such an image is generally accepted (Echtner & Ritchie 1993: p. 4; Padgett & Allen 1997: p. 50; Tapachai & Waryszak 2000: p. 38) to be based on attributes, functional consequences, (or expected benefits) and the symbolic meanings or psychological characteristics consumers associate with a specific destination (or service), and therefore the image influences destination positioning and ultimately the tourist's buying behaviour.

In trying to operationalise the various dimensions of hedonic consumption experiences and related image formation at different levels, it is useful to refer to a polyinclusive approach (Go & Fenema 2003). The polyinclusive model, as depicted in Figure 1-1, helps to explain the need to deconstruct destination image, both from a demand and supply perspective.

First, at the demand side, a new lifestyle is emerging characterized by mobility, fast-pacedness, polyscriptedness, and parallelization of experiences (e.g. walking with Walkman, or "floating in multiple blind dates in virtual chat-rooms" (Magala 2002: p. 2) while at work), plus "the blocking out of sensory stimuli, denial, and cultivation of a blasé attitude, myopic specialization, reversion to images of a lost past…, and excessive simplification (either in the presentation of self or in the interpretation of events)"(Harvey 1989: p. 286). People enter, occupy and exit multiple spaces at different times and in an unsynchronised manner. These multiple spaces are categorized in Figure 1-1 as material space (e.g. physical tourism product at the destination), information space (e.g. online representations), mental space (e.g. perceived destination image) and social space (e.g. sharing tourism experiences with and through social relations). Interaction in these spaces or worlds leads to complex, if not chaotic patterns but also novel opportunities (Go & Fenema 2003: p. 1). For instance, their participation in increasingly more and different social networks (on- or offline) implies that consumers are confronted, on a daily basis, with contrasting worldviews, many of which can be characterized as emotional, leaving a mental imprint, with which consumers are forced to cope. Werthner and Klein (1999: p. X, Preface) even argue that, for some, it becomes ever more difficult to distinguish 'virtual' from 'real'.

Second, from a supply perspective, the argument is "that global technology has deconstructed both nation-states and the old-metaphysics of (social) presence" (Featherstone & Lash 1995: p. 13) (See also (Castells 1997; Hall 1996; Ohmae 1995)). "An essential issue is the emergence of transnational mediascapes, ethnoscapes and technoscapes: international social, political and cultural institutions are superseding national ones. The global increasingly informs the local, so deconstructing ideas like the 'nation state'" (Featherstone & Lash 1995: p. back-flap)... and in its wake the traditional tourism destination and the theoretical concept of destination image is unavoidable. It also raises questions about decision-making processes and power struggles at the level of the tourist destination, as it needs to be determined what and how place identity should be positioned in the global flows of images dominated by the media and who should be

responsible. As Castells (1996: p. 476) argues: in the network society "image-making is power-making". Therefore this dissertation presents an alternative model dealing with emerging issues regarding the way tourism destination identities are constructed, imagined and experienced, under conditions of seemingly pertinent discontinuity and interactivity. Already it seems apparent that this requires an approach positioned at the interface of strategic marketing and information and communication technology (ICT from a marketing channel and consumer focus (Van Bruggen 2001), see section 2.2).

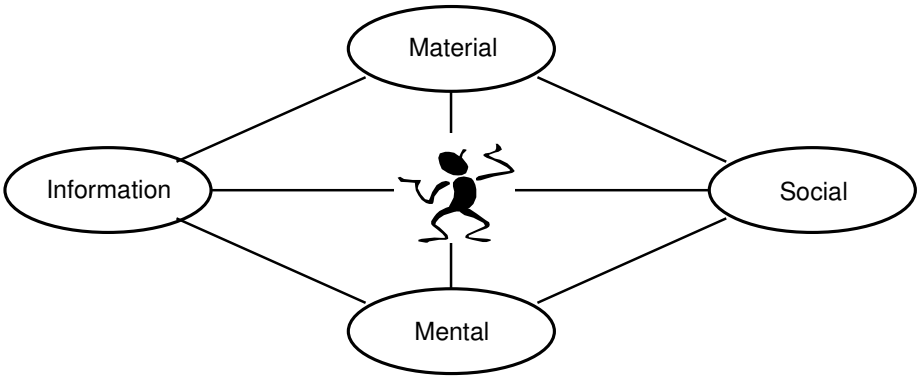


Figure 1-1: Polyinclusive levels of hedonic consumption experiences.
Note: From "Moving Bodies and Connecting Minds in Space: It is a Matter of Mind over Matter", by Go, F.M. & Fenema, P.C.v., 2003, *Proceedings of the 19th European Group for Organizational Studies* (pp. CD-ROM), *EGOS Colloquium 2003*, Copenhagen, Denmark. Reprinted with permission.

Experiential products such as tourism share the characteristics of other services, in the way that production and consumption take place simultaneously. Therefore, the consumer, as well as other tourists, participates actively in the service operation and creates meaning to the event. It implies that consumers are also actively engaged in the process of creating and attaching meaning to tourism destination image, which by definition is a consumer-oriented concept (Padgett & Allen 1997: p. 50). Therefore, one could assume that the media and the interactive nature of the internet add whole new dimensions to marketing destination image and branding. The effects of the developments in ICT are therefore profound, changing consumers' extravagant expectations and shifting power structures in the distribution channel. Information (available anywhere at any time) "is the key to the omnipresence of global brands, computer reservation systems, transnational benchmarking and the need to view competition both from [chaotic] international and at the same time local perspectives" (Go & Haywood 2003: p. 87).

From a supply perspective, therefore, the sense of urgency should be acknowledged at the decision-making level of destination management. Until now, destination marketing organisations (DMOs) have concentrated on imaging "spaces of places", i.e. "the locale whose form, function and meaning are self-contained within the boundaries of physical contiguity" (Castells 1996: p. 423). Unfortunately, the importance of spaces of flows, where capital, information, technology, organisational interaction (people) and images,

sounds and symbols are moved (Castells 1996: p. 412), has of yet received limited acknowledgement in many destinations. These spaces of flows have been termed ethnoscapes, mediascapes, technoscapes, financescapes and ideoscapes by Appadurai (1996: p. 33), where "the suffix – *scape* allows us to point to the fluid, irregular shapes of these landscapes" (emphasis in original). The importance of "the relationship between the space of flows and the space of places, between simultaneous globalization and localization" (Castells 1996: p. 425), can be observed in regions and 'city states', including Silicon Valley, Singapore, Kuala Lumpur and vicinity, Dubai or Hong Kong, to name but a few (Ohmae 1995).

In the network society, the destination marketing organisation (DMO) is under renewed pressure to decide whether and how to project the local identity of place in the expanding global flows of images. The time that it was able to do this single-handedly, only with those 'insiders' at boardroom level, is over. In the network society 'outsider' local agents of change need to be included in the decision-making process as well. Participatory relations need to be instigated between those initiating and involved in the conversion of resources, including heritage, hospitality and manpower, into resources supporting modern tourism functions; and those involved in the shaping and projecting of the tourism marketing images. As a consequence of this pressure on the DMO decision-making process several contradictions and conflicts emerge.

As Morgan and Pritchard (1998; Pritchard & Morgan 2001) explain, place identities are constructed through historical, political and cultural discourses and are influenced by power struggles. The flows of organisational interaction and their related legislative framework, involves a distinctive hierarchical structure composed of relationships among national, regional and local governments. The latter tend to be dominated by political processes. As identity and image are often linked to ideology, the risk that the DMOs decision-making process might be hijacked by power struggles, is all too real. "What is depicted or not depicted in destination image advertising, and on whose authority it is selected, involves a more complex question of what comprises the destination and who has the power to define its identity" (Fesenmaier & MacKay 1996: p. 37). Also Ateljevic and Doorne (2002: p. 648) "reveal imagery as a political process that encodes and reinforces the dominant ideology of tourism culture, essentially a global process which manifests locally and explicitly involves the construction of place".

At the same time, an overlapping framework is that of the flow of capital, involving multinational enterprises, including hotel chains and tour operators, major credit card companies and banks; global decision-makers that influence processes at the local level (Go & Pine 1995). A good example is the case of Morocco's branding campaign as discussed by Polunin (2002: p. 4). The Moroccan tourist board thought it had a winning strapline - 'A Feast for the Senses' - which was supported by stunning visuals of the Moroccan countryside and culture. Initially widely accepted, the branding campaign was later sabotaged by German tour operators who sought a sun and sea product for their clients.

This dissertation examines, amongst others, this tension between cultural identity and commercial interests. In particular, there is a desire within the cultural community and

public sector to project imagery that represents an authentic identity of place, whereas commercial interests are keen to stage authenticity (Cohen 1988: p. 371; MacCannell 1973) to represent desirable tourist activities, or convenient commodities for consumption. Yet, at the same time, the expanding flows of technology and information empower local people and responsible consumer groups to take up their own coordination and control role as communities of practice (Harvey 1989: p. 303). Hence the confrontation of supply and demand perspectives when dealing with the consequences of a changing society on the way in which places are constructed, seems to require repeated attention, as it will in this dissertation.

1.3 Problem Definition: De-constructing the tourism destination image model

As part of these changes on both the demand and supply side of tourism (host versus guest perspective), where consumers create confused subjective destination images based on an onslaught of information from a wide variety of online as well as offline sources of varying quality, the online environment posts whole new challenges. Tourism networks are in transition and the impact of information technology is profound. Information systems that connect the economic actors and in which trust, social capital, and collaborative relationships become the key concepts of interpretation (Kumar & Dissel 1998: p. 199), are essential. To build the networks needed for consistent imaging of place across sectors and pressure groups, and to create a strong identity in a versatile online environment, destination branding might just hold one of the keys (Govers & Go 2003a). Anholt supports this idea as he states the following: "As brands gradually become the dominant channel of communication for national identity, it becomes ever more vital to push other channels - by encouraging first-hand experience via tourism; by the careful management of international perceptions of a nation's foreign policy decisions; and by the representation of national culture" (2002: p. 233-234).

But in order to achieve this, a deconstruction of the destination image paradigm seems unavoidable. "Deconstruction, as a poststructuralist interpretive method, has been used to comment on post-modern culture and to question commonly held truths and values. It has been termed a 'criticism of received ideas'" (Fesenmaier & MacKay 1996; Norris 2002: p. 134) (see also (Harvey 1989: Chapter 3)). However, deconstruction can be applied to various scholarly activities as a method for questioning established models and practices. It refers to the necessity to deconstruct traditional ways of thinking and behaviour. In other words, first one destroys and then one constructs. That process of deconstructing is not only an approach of post-modernist philosophy but is also known as "creative destruction" within innovation theory (Schumpeter 1975: p. 82). This research on innovation confirms that business organisations that are able to apply innovation to improve their processes or to differentiate their products or services, outperform their rivals. However, the challenge of innovation is inherently risky; most new technologies and new products are not commercial successes. In short, innovation can enhance competitiveness, but requires 'breaking the rules', that is to say a different set of knowledge and skills is required from those of everyday practice in the tourism and particularly the DMO context. This dissertation hopes to facilitate that.

The deconstruction approach applied in this research has several antecedents and implications both from a theoretical as well as practical perspective. First, from a theory building perspective, chapter 2 will, probably for the first time ever, analyse the concept of destination image at an integrative level, as we disassemble the destination image formation model into its constituent parts. This decomposition is traced all the way back to the first philosophers of the modern era, such as Descartes & Locke, who laid the foundation for the research into aspects of identity, image and experience. Based on a further review of parent and immediate disciplines, the need to deconstruct destination image, and the way this should be done, is argued from a theoretical perspective in detail. Subsequently, a thorough literature review provides close-up insights into the many components of the image formation model. While emphasising the dynamics of the model and its constituent parts, traditions in literature are confronted and innovations suggested, particularly through the review of the impact and application of ICT. Empirically, the need to deconstruct the destination image formation model and its measurement, will be illustrated in section 4.1. The research reported there provides evidence for the assertion that traditional destination image measurement methodologies are incapable of explaining consumer perceptions, preferences and destination choice. Hence, again through a process of creative destruction, the use of innovative methodologies is suggested in order to reconstruct the destination image measurement paradigm from the ground up.

From an applied perspective, the research context of Dubai, which is presented in chapter 3, illustrates the need to deconstruct destination image vividly. The different ways in which national brands (such as for instance Dubai - and by extension its tourism destination brand (Govers & Go 2003b, 2004)) are perceived in a different country (say the Netherlands) and how this diversity of perceptions can be managed in international branding campaigns is central to the research into destination image. Concentrating on satisfying extravagant expectations, Dubai is trying to lure tourists to a virtual Middle East with 7-star hotels, under water and in the sky; man-made islands in the shape of palm trees and the world map; and an Arabian Florida. Dubai not only creates images, but even transforms "those images into material simulacra in the form of built environment, events and spectacle" (Harvey 1989: p. 290). This is illustrated by project developments such as: The Lost City, The Venetian Village Resort, The Brazilian Tree House Resort; The Old Town, Dragon Mart, The Forbidden City, or the Dubai Shopping Festival. But what about the Arabian cultural identity and Bedouin heritage and the long established (mis)perceptions of the East, in relation to the West? To what extent does the 'new fulfilment' of extravagant expectation overshadow such latent perceptions of a looming "clash of civilisations" (Huntington 1993) and the Middle East region as a bunch of oil obsessed despotic states with white robed men (Said 1981)?

When evaluating destination image in a region such as the Middle East, we have to conclude that traditional destination image theory is inadequate, as there seems to be a need to link image to issues of identity and communication within a time-spatial context (as opposed to "'disembedding', and the hollowing out of meaning in everyday life" (Featherstone & Lash 1995: p. 2)). This leads to the need for tourist destinations to build brand equity (Aaker 2001; Aaker & Joachimsthaler 2000; Riezebos 1994) and sustain their competitive advantage, as opposed to competing on global standardised attributes based on Western media-generated extravagant expectations. One of the goals of this study is

therefore to understand how tourists construct their perceptions of tourism destinations and how the DMO could manipulate image projections in order to influence tourist behaviour and build brand equity in a competitive market. To facilitate this, the model that is developed in this dissertation attempts to provide a better insight into the way in which tourism destinations' identities are constructed, imagined and experienced.

1.4 Research Objectives

Against this theoretical background the following specific research objectives have been formulated:

1. *Through literature review and theory development, deconstruct the destination image formation model, in order to reveal all those components that have a dynamic influence on the way in which people construct images of places.*

In essence, the proposed model builds a triadic tension between place identity, its projection and the perceived image, i.e. the way in which the place is perceived by consumers and potential tourists. This tension is short circuited during the travel experience, when host (supply) meets guest (demand). At this instance, three potential gaps could negatively affect the level of satisfaction experienced in the host – guest encounter. As all three gaps abbreviate to 'TDS', we have coined them the three TDS-gaps of destination image formation. First, the Tourism Development Strategy gap might indicate a mismatch between place identity and what is projected. Second, the Tourist Demands Specifications gap occurs when consumer perceptions are incomplete, false or unbalanced. Lastly, the Tourism Delivery and Supply gap reveals itself when the service delivery that facilitates the tourism experience, does not live up to set standards and fails to fulfil the expectations raised. In chapter two we will deconstruct this model in more detail in order to identify all its dynamic components.

2. *To evaluate new methods for measuring projected and perceived destination image as influenced by the online as well as offline marketing and communication efforts of DMOs and the tourism industry, and more subtle manipulations as through the media, arts, literature, and other narratives.*

A strong image means perceived superior customer value that positively influences buying behaviour and consequently enhances marketing effectiveness (Echtner & Ritchie 1993; MacKay & Fesenmaier 2000; Padgett & Allen 1997; Sirgy & Su 2000; Tapachai & Waryszak 2000). Many academics have acknowledged the relevance of this research area in the past, and have tried to measure destination image applying multi-attribute systems, using quantitative common measurement scales (Echtner & Ritchie 2003; Gallarza et al. 2002). However, in recent years the call for more pluralistic approaches to understanding tourism destination image formation has become louder (Feighey 2003; Jenkins 1999; MacKay & Couldwell 2004). In an earlier study by Govers and Go (2001), the traditional multi-attribute system, used in tourism destination image literature, was incapable of measuring differences in destination image among different groups of consumers that show unequal levels of destination preference (i.e. based on this method, tourists that visit a destination regularly, do not report a different image of that destination, compared to non-visitors). Therefore, as will be illustrated in chapter 4, multi-attribute approaches on their own seem to be inadequate in measuring destination image or visitors' ratings of

tourism destinations and alternative methods should be evaluated. As in Kierkegaard's perspective - discussed in detail in section 2.1 - the subjective truth of the individual seems to be more important that the objective common attributes and an existentialist constructivist approach seems to be more promising.

3. *To analyse the extent to which the projected and perceived online destination images correlate to the destination's identity: its authenticity, cultural heritage and natural resources.*

Studying this aspect of projected and perceived destination image, through the analysis of content of publications about destinations as well as consumer responses to them, will give insight into the tourism development strategy and tourist demands specifications gaps (gaps 1 and 2). However, in section 2.1 it will be contended that objective knowledge of the identity of things does not exist. So how would one be able to make such comparisons about the identity and projected and perceived images of places? Two approaches are proposed. First, an in-depth research background analysis of the destination in question is conducted through literature review and expert opinion interviews (such as Locke's botanical expert, discussed in section 2.1, probably being most able to achieve detailed knowledge of the nature of roses). This should lead to a good understanding of the identity of place. Second, it is assumed that if there is a strong correlation between identity and image, there should be a high degree of communality across tourism sectors in terms of the image that is projected and between consumer groups in terms of what is perceived. In other words: does everyone project and perceive the same message? If so, there probably is a high degree of correlation; because if the florist says the rose is red, and all the customers agree, the rose probably is red, but if needed, the botanical expert could be asked to confirm.

4. *To identify differences in perceived destination image between online consumers with varying cultural backgrounds, and social, personal, and psychological characteristics and to what extent it is influenced through direct tourism experiences, the hedonic consumption of tourism and the communication with others through word of mouth and mouse.*

One contemporary issue in destination or brand image is referred to as 'self-focus', where the affective evaluations are not a description of the object, but of the relationship between the consumer and the object. There are several authors that support the notion that perceived destination image is mediated by socio-demographic, personal and psychological consumer characteristics, such as travel motivations, aspects of learning, age, gender, social class, and cultural background (Baloglu & McCleary 1999; Beerli & Martín 2004a, b; Calantone et al. 1989; Dann 1996b; Gartner 1993; MacKay & Fesenmaier 1997; Sirgy & Su 2000). It would be of interest to identify the extent to which consumers are prejudiced based on their background and how perceptions change, considering its ephemeral nature (Castells 1997; Harvey 1989). Such differences and changes might have a large impact on people's perceived destination image and therefore influence these travellers' future destination choice behaviour and possibly that of other prospective tourists (providing insight into gaps 2 and 3).

5. *To assess the potential benefits of branding as a tool for dealing with diversity of perceptions and the way the destination identity is coherently projected through marketing, media and communication and the product offering itself, matching the consumers' expected tourism experience.*

In Gnoth (2002: p. 262) "the theoretical models of the tourism system, the tourism product (experience) and country brand are operationalised and fused so that a detailed process emerges which describes how the brand can link the tourism experience with the product and services that facilitate it... This aids in the management of the multiplexity of interactions between tourists and the destination's products and services…". If a destination is able to formulate a compelling and comprehensive brand story, and build brand equity (Aaker 2001; Aaker & Joachimsthaler 2000; Riezebos 1994), which mobilised all (or many) of its emotional, multisensory and fantastic elements based on the destination's identity, it should facilitate in projecting the right destination image through marketing communication. In addition, it should direct the creation of the right tourism product offering, particularly the way it is delivered by guiding the stories that hosts share with guests; and finally, it should exploit the value of positive word of mouth/mouse by providing subconscious or real cues that create common stories for consumers to share. As a final result this should lead to tourism experiences that match the perceived destination image, which in turn is embedded in the consumer's script (Schoemaker 1996), and therefore facilitates the bridging of the three TDS gaps.

1.5 Methodology

Ryan (2000) builds on the social and environmental psychology domain and specifically the literature on the sociology of knowledge and environmental learning to explain that 'reality' refers to phenomena that exist 'out there' independent of our own volition. Yet, reality has a different meaning to each individual, which implies that knowledge of reality is a social construction. "Qualitative research thus needs to capture the objectivity of consensus and the meaning for individuals. Thus qualitative research does not exist separate from empiricism, but extends empiricism towards individuality" (Ryan 2000: p. 122).

Ryan then continues to state that including this subjective point of view makes the process of data collection complex, but is the only guarantee that scientific researchers do not lose sight of reality. Phenomenographic analysis is hence suggested as an appropriate method as it "is able to capture the interpretation of tourism, to understand what tourist experiences [and perceptions] are, and how they are structured into learning" (Ryan 2000: p. 122).

This is grounded in the philosophical foundation of Kant's constructivism and Kierkegaard's and Heidegger's existentialism (discussed in detail in section 2.1). At the same time we will apply a deconstructionist perspective of existing destination image research, as suggested by Fesenmaier and MacKay (1996: p. 39): "Deconstruction in hermeneutics focuses on language, author, reader, text, history, interpretation, meaning, and context", as practiced by Derrida (1930-). "From the work of Husserl and Heidegger, Derrida derives the view that meaning emerges only provisionally, from an endless process of re-interpretation based on the interaction between reader and text" (Kemerling 2001, Section. A Dictionary of Philosophical Terms and Names, ¶ Derrida, Jacques). But

deconstruction also applies a post-modern approach with its "concern for difference, with the difficulties of communication, for the complexity and nuances of interests, cultures, places, and the like" (Harvey 1989: p. 113). In this dissertation this approach has been applied to the existing body of literature on destination image measurement research, supported by empirical evidence on the inapplicability of traditional methodologies, as presented in chapter 4.

But returning to the specifics of phenomenography, which forms the foundation of most of the research conducted in this dissertation, it has been defined by one of the Scandinavian founders of the school of thought as: "the empirical study of the limited number of qualitatively different ways in which we experience, conceptualize, understand, perceive, apprehend etc, various phenomena in and aspects of the world around us" (Marton 1994: Phenomenography). "Phenomenography is thus related to phenomenology in that both are concerned with an understanding of what constitutes the structures of conceptualising a phenomenon, but the latter is, in practice, a construct of the researcher, whereas phenomenography is concerned with eliciting the individual's construction"(Ryan 2000: p. 123). Ryan acknowledges though that there are practical research problems in applying phenomenography. The time and resources needed to transcribe collected data and analyse the transcripts as well as criticism of subjectivity of interpretations by researchers. Ryan finds a solution to this in recently developed artificial neural network software, which automates content analysis. It is on this foundation that most of the research in this dissertation is based. Chapters 3 and 4 will illustrate that these new technologies and methodological considerations can open doors to new areas of research.

The dissertation will investigate both projected as well as perceived image, which refers back to the beginnings of Descartes' adventitious and factitious ideas (*Meditations III*) (see section 2.1). In both cases, i.e. projecting and perceiving, the main vehicles are language (either in acoustic or written form) and images (Atkinson et al. 1987: Chapter 9; Dann 1996a; Dann 1996b; Fesenmaier & MacKay 1996; Uzzell 1984). In strict psychological terms, our mental imagery is in fact the result of perceiving, although we might have altered the sensual cues through inferences, stereotyping and schematising. That means that we do not even have to ever have seen any visuals or read any books about a certain place, but still be able through these mental processes, to create mental imagery. For instance, within the research context of Dubai that will be discussed in chapter 4, we might, at some point in our lives, have read about the oil sheikhs of Saudi Arabia in the news, watched Bertolucci's movie The Sheltering Sky, and observed camels in the zoo. All sensual cues that had nothing to do with destination Dubai, but, if we know nothing about Dubai, but infer that it is in the Middle East and therefore must consist mostly of desert landscape, we might end up with a mental image of a man in a long white robe and a white cloth on his head, held together by a black rope, sitting on a camel surrounded by sand dunes. After visiting Dubai or watching a documentary, our image might indeed change completely. Therefore, when this dissertation refers to "people's perception of place", what is really meant is "people's mental imagery of a place". Our research is not so much concerned with the actual psychological process of perceiving and storing, as it is with measuring the imagery that is retrieved from people's minds when asked (including the results of inferences, stereotypes and schemata). This dissertation then refers to "perceived image" in order to distinguish it from "projected image" and the concepts of perception

and image are sometimes used interchangeably, although in strict psychological theoretical terms, this is not completely correct, it facilitates readability. In fact, Atkinson et al. (1987: p. 303) even state that "imagery may be like perception because it is mediated by the same part of the brain".

The research framework that will be applied is depicted in Figure 1-2. As mentioned, both perceived and projected images will be researched through text and pictures. Unfortunately, the technology, that would allow us to retrieve peoples' mental imagery directly from their mind in graphical format, does not yet exist. Therefore, the only way to identify these images is through peoples' verbal or written accounts describing them, for which the area of narrative psychology can be of help. Narrative Psychology contends that people have the natural propensity to organise information about experiences in story format. It also suggests that people relate their interpretations of experience to others by narrating, or 'telling stories'. (Padgett & Allen 1997: p. 53). Therefore, this research relies on the assumptions of the narrative mode of thought in order to elicit peoples' visual and narrative imagery.

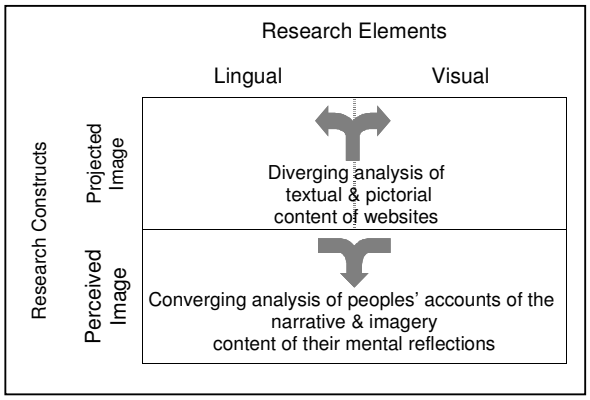


Figure 1-2: Research Framework

Lastly, for the categorisation of destinations, fuzzy set theory will be utilised (Viswanathan & Childers 1999; Wedel & Steenkamp 1991). Fuzzy sets, or in this case rather, crispy sets of destinations exist when destinations are similar based on certain features, but not on others. For instance Rotterdam (Metropolitan, Shopping, Modern) is completely different from Tossa-de-Mar on the Costa Brava (Beach, Warm climate, Outdoors). Based on these features however, both could easily be in the same set of destinations like Dubai. This illustrates how destinations, based on the number of shared features reach a certain level of 'family resemblance'. Fuzzy set theory will be used to categorise destinations based on data collected, but also to explain 'fuzziness' as a result of cultural diversity.

1.6 Definitions

Tourism

In order to understand the frame of reference within which this research is conducted, we need to specify what we consider to be 'tourism'. We tend to adhere to the widest definition, such as formulated by the World Tourism Organisation.

> Tourism is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
>
> The use of this broad concept makes it possible to identify tourism between countries as well as tourism within a country. 'Tourism' refers to all activities of visitors, including both 'tourists (overnight visitors)' and 'same-day visitors' (WTO 2000, Section. Concepts, ¶ Tourism).

Hence, we do not tend to exclude any type of tourism, neither business travel, nor domestic travel, nor same-day trips. Place identities, projected and perceived images are of relevance in all cases, whatever the consumer's future travel purpose is likely to be, or whatever the distance between place of residence and destination. Of course, as a trip turns out to be a business trip or a holiday, the relevance of different aspects of the perceived image will either increase or diminish in importance. However, the perceived image is still the same, only the way in which it impacts the formulation of expectations is different. At the same time, examples and arguments throughout this dissertation are often drawn from and formulated within the context of international leisure travel as it facilitates clarity. Nonetheless, that does not imply that the findings and conclusions do not apply to other forms of tourism.

Destination Identity

Place identities are constructed through historical, political and cultural discourses and influenced by power struggles. National, cultural, natural, social and religious assets become important identifiers (Morgan & Pritchard 1998; 2001). This dissertation will often refer to the 'true identity of place', with which we mean to include the full set of unique characteristics or set of meanings that exist in a place and its culture at a given point in time, nevertheless realising that this identity is subject to change and might include various fragmented identities. In any case, it is argued that if the right expectations are to be created in the minds of potential visitors, and to avoid unpleasant surprises, the "true identity of place" should be the foundation on which to build the tourism proposition. Some practical moorings are provided by Noordman (2004) in his listing of structural (location and history), semi-static (size, physical appearance and inner mentality) and colouring (symbolism, communication and behaviour) elements of place identity.

Projected Narratives

The real question about identity is: what comprises the destination, how do we define its identity and project it accordingly, using narratives and visuals? In general terms: how would tourism destination managers delineate these narratives? When tourism destinations are defined at the level of countries, some help in answering this question is provided by Hall (1996). He phrases the question as follows. "But how is the modern nation imagined? What representational strategies are deployed to construct our common-sense views of national belonging or identity? …How is the narrative of the national culture told? Of the many aspects, which a comprehensive answer to that question would include", Hall

selected five main elements: first, there is the narrative of the nation, as it is told and retold in national histories, literatures, the media, and popular culture; secondly, there is the emphasis on origins, continuity, tradition, and timelessness; a third discursive strategy is the invention of tradition; a fourth example is that of the foundational myth (also elaborated upon by MvLean & Cook (2003: p. 155)); and lastly the national identity is also often symbolically grounded on the idea of a pure, original people or "folk" (Hall 1996: p. 613).

Tourism Product

The components that build the tourism product are commonly referred to as the 4 A's: Attractions; Amenities (or hospitality industry (i.e. accommodation and F&B/Catering services) and retailing); Access (or transport); and Ancillary Services (or visitor centres, insurance and financial services) (Cooper et al. 2000; Page 2003). For reasons of clarification we need to point out that in the 3-gap tourism destination image formation model, travel trade partners (tour operators and travel agents) are not part of the product offering itself. They are rather actors in the distribution and communication process (as covert induced agents) and therefore instrumental to projecting the tourism destination image as defined by the DMO and other actors in the tourism industry at the local level. In general terms, the characteristics that distinguish tourism services from goods are: intangibility, inseparability, variability, and perishability (Hoffman & Bateson 2002: p. 27; Kotler et al. 2003: p. 42; Lovelock & Wright 2002: p. 10; Weaver & Lawton 2002: p. 206).

Destination Image

Destination image was first defined by Hunt (1971) as the total set of impressions of a place or an individual's overall perception (Bigné et al. 2001; Fakeye & Crompton 1991; Hunt 1971; Hunt 1975). It has also been referred to as a 'mental portrayal or prototype' (Alhemoud & Armstrong 1996; Crompton 1979; Kotler et al. 1993; Tapachai & Waryszak 2000: p. 37) of what the travel experience might look like. "The image of a destination consists, therefore, of the subjective interpretation of reality made by the tourist" (Bigné et al. 2001: p. 607). Such an image is generally accepted (Echtner & Ritchie 1993: p. 4; Padgett & Allen 1997: p. 50; Tapachai & Waryszak 2000: p. 38) to be based on attributes, functional consequences, (or expected benefits) and the symbolic meanings or psychological characteristics consumers associate with a specific destination (or service), and therefore the image influences destination positioning and ultimately the tourist's buying behaviour. Also destination image is a clear antecedent of quality, satisfaction, decision-making and post purchase behaviour (Bigné et al. 2001; Kotler et al. 2003).

It is apparent that similar to the discussion above about the 'true' identity of place, 'the' destination image does not really exist either. Different projections and perceptions are individual or community constructions and different individuals and communities might have different or fragmented insights. Arguably it would be better to refer to the 'dominant view', which would normally more or less correspond to the destination's identity in line with Hall's narrative of the nation. Therefore, when this thesis refers to 'the' destination image, what is really meant is the 'dominating image' or the tendency of stereotyping a destination. Nevertheless, for the sake of readability, the dissertation mostly refers to 'the'

image, as if it were one single concept, keeping in mind that it is actually an individualised construct, which incorporates many variations and interpretations.

Hedonic Consumption Experience

Tourism can be categorised as a form of hedonic consumption, where the experience is an end in itself (Hirschman & Holbrook 1982; Leemans 1994; Vogt & Fesenmaier 1998). Hirschman and Holbrook (1982: p. 92) emphasise the importance of multisensory, fantasy and emotive aspects of experiential or hedonic products such as tourism (the "three Fs": fantasies, feelings and fun (Holbrook 2000: p. 178; Holbrook & Hirschman 1982)). Urry (2002) clarifies and extends the argument that tourism experiences have a fundamental visual character, drawing a analogy with Foucault's concept of the gaze. He develops the notion that there are diverse tourist gazes. Others prefer the alternative metaphor of 'performance', or the way Fairweather and Swaffield (2002: p. 294) describe it as "the graded experience of the Elizabethan theatre,…in which some of the audience become active participants, some choose to remain detached spectators, and others move between the two. Furthermore, watching others in the audience perform becomes part of the experience".

Destination Branding

Destination branding refers to branding and building brand equity (Aaker 2001; Aaker & Joachimsthaler 2000; Riezebos 1994) in relation to national, regional and/or local culture. Aaker and Joachimsthaler (2000: p. 17) define brand equity as a set of "brand assets (or liabilities) linked to a brand's name and symbol, that add to (or subtract from)…(the value provided by)… a product or service". The assets and liabilities on which the brand equity is based will differ from context to context. However, they can be grouped into five categories: brand loyalty; name awareness; perceived quality; brand associations in addition to perceived quality; and other proprietary brand assets - trademarks, channel relationships. Branding can be used to mobilise value adding partnerships and networks in the tourism industry in order to build a coherent product offering communicated in the right way in order to guarantee the emotion-laden tourism experience that consumers are looking for (Bridging the delivery and supply gap).

1.7 Delimitations

Destination image has been studied from many perspectives, as will be illustrated in detail in chapter 2. However, one potentially rich approach that has received little attention so far is to study this phenomenon in an online environment. As Tourism is an information intensive industry, which itself consists of complex global networks (Sheldon 1997; Werthner & Klein 1999: Section 1.5), ICT has had a significant impact on both tourism research and practice. Therefore, it was decided to focus this dissertation on the interface of tourism destination image and ICT. It needs to be emphasised though that projected and perceived images are not restricted to the online domain and many factors that influence destination image formation will find their most important sources of inspiration in the offline world. The advantage of the internet is that it is one of few truly global media that make it possible to study destination image formation on a global scale, without having to

take into account the translations and modifications that intermediaries implement in local source markets. The internet makes it possible to study the direct interaction between destination and tourist, and tourists amongst themselves. Nevertheless, future research should expand the approach presented in this dissertation to the offline world.

In chapter 3, the projected image analysis is based on the empirical findings related to only one destination, Dubai, while perceived image in chapter 4 is compared with other destinations as well. To get a detailed insight into place identity and the projected image, a comprehensive context specific approach is needed. Because of time and resource constraints we restricted our research to one destination only. To measure perceived image through large sample survey questionnaires, is relatively cost effective and makes it possible to include more than one destination. An added advantage is that comparability with other destinations affirms the discriminant validity of the research instrument.

The empirical analysis of the projected image is restricted to the online marketing efforts of major players in the tourism industry within the research context of destination Dubai. Secondary place interactions and temporal environmental or situational influences are only partially included through the research background analysis. However, it would be a fallacy to assume that this is at al exhaustive. To acquire a full insight into the identity and projection of place, separate research projects would be needed to determine the complete historical, social, cultural, political, natural, technological and economic constructions of the locality, which would be beyond the objectives of this research. Determining identity in the perception of local population, industry and government is also not included. However this is indeed an interesting separate field of study, which deserves more attention. For this, we would suggest that the reader refers to the ongoing work by Van Keken (Van Keken & Go 2003, 2004) (www.bestemmingzeeland.nl).

There is a vast body of literature on destination choice process modelling (for a detailed overview see (Sirakaya & Woodside in press)). The most commonly used model is that which involves five stages: (1) need recognition; (2) information search; (3) alternative evaluation and selection; (4) purchase; and (5) outcomes (or post-purchase behaviour) (Blackwell et al. 2000: Chapter 3). It could be assumed that perceived destination image will change as consumers go through these various processes. At the same time, however, it is also widely recognised that, particularly with regard to experiential products like travel and tourism, consumers are involved in an ongoing search for information (Leemans 1994: p. 23). "In other words, they are always searching and not necessarily because they are planning to buy" (Vogt & Fesenmaier 1998: p. 553). As a result, the need recognition, information search, and alternative evaluation and selection processes, might prove to be more dynamic and non-sequential in tourist destination selection, as they are in other non-hedonic product purchase decisions. Decrop and Snelders (2004) support this notion as they found that vacation planning is an ongoing process, which entails a lot of adaptability and opportunism, where fantasy and emotions also play an important role. Hence, this departs from traditional rational decision-making models.

Another approach to destination choice modelling involves choice sets (Ankomah et al. 1996: p. 138; Um & Crompton 1990; Woodside & Lysonski 1989). "The concept postulates that there is a funnelling process which involves a relatively large initial set of

destinations being reduced to a smaller late set [besides inert and reject sets], from which a final destination is selected [from the action set as opposed to the inaction set]" (Ankomah et al. 1996: p. 138). It can be assumed that perceived destination image changes as consumers move destinations from one set to another. This is also supported by Ankomah et al. (1996) who found empirical evidence to support the notion that the accuracy of cognitive distance estimation (as a possible component of perceived image, see Table 4-1) varies among choice sets. However, at the same time it is proposed by Sirakaya and Woodside (in press: p. 14) that "revisions occur to such consideration sets in a dynamic process as consumers move mentally toward making commitment and rejection decisions; [and]… consumers are able to easily report intention probabilities to visit alternatives in consideration sets and these probabilities are revised dynamically". Therefore, linking changes in perceived destination image to altered choice sets will be a challenging task and much of it is likely to depend on situational constraints (Sirakaya & Woodside in press: p. 11). Not much research has been reported in this area, but for one thing, chapter 3 will show that traditional attribute based destination image research seems to be incapable of establishing such relationship between destination choice modelling and image. Therefore, evaluating alternative methodologies for measuring destination image must be a first priority in this dissertation.

As soon as effective standardised methodologies for measuring perceived destination image become available (as illustrated above, much has been written but without agreement), evaluating the relationship between destination choice modelling and perceived destination image will be a vast area for future research. This however, is not the focus of this dissertation. It therefore attempts to avoid measurement issues in terms of relating perceived destination image change to the progression within the different destination choice stages or formation of choice sets. In so doing, this study focuses primarily on pre-purchase perceived destination image in general (which in itself constitutes a complete gap in existing literature). In chapter 4, where perceived image is measured, some questions will test if a destination has made it to the late set, or if active information search about the case destination has likely been conducted or not. However, apart from that, no specific attempt is made to relate destination image formation to choice modelling. This is left for future research.

Bigné et al. (2001) study the relationship between perceived image and perceived quality and customer satisfaction and their respective influence on post-purchase behaviour, measured by intention to return to and recommend a tourist destination (much of this also based on the work by Oliver (1999)). From the perceived image perspective, the emphasis in this dissertation lies primarily on assessing destination image pre-visit and on evaluating alternative methods for doing so; both of which are major voids in exiting research. Also, sources of pre-visit image (induced, organic or autonomous agents (Gartner 1993)) and differences according to cultural, social and personal characteristics will be studied. The change in perceived image post-visit and impact on perceived quality and satisfaction are addressed, but as peripheral issues. The impact of these on behavioural aspects such as repeat visits and willingness to recommend the destination to others, are more conative elements which are outside of the perimeters of this study.

1.8 Outline of the Report

The dissertation is organised around the destination image formation model as will be discussed in chapter 2. This leads to a structure which includes five chapters. A logical overview of this is provided in Figure 1-3

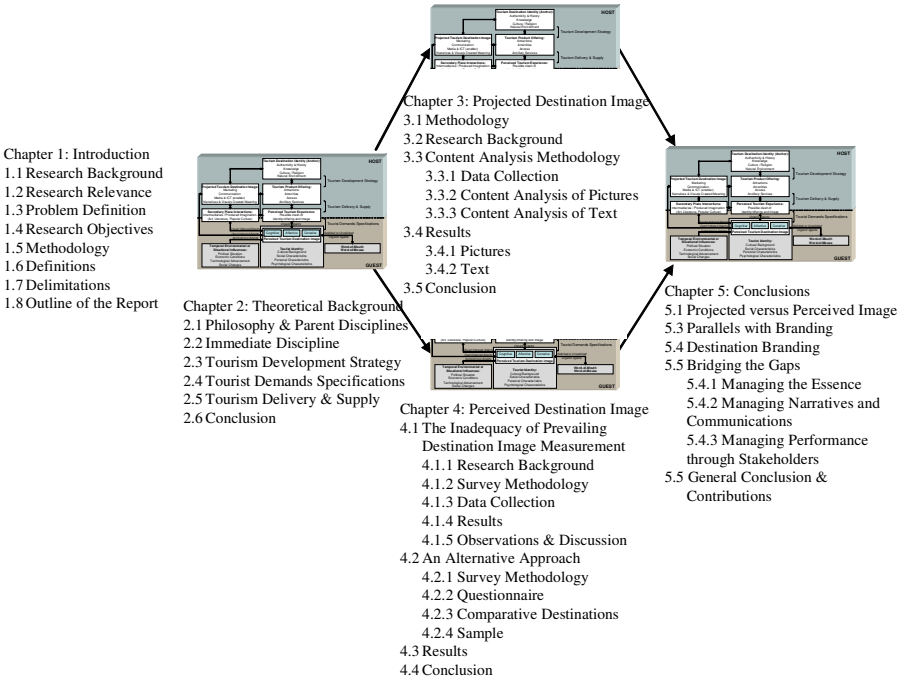


Figure 1-3: Outline of the Report

After this introductory chapter, chapter 2 will discuss the destination image formation model in detail from the 3-TDS-gap perspective, but only after the research philosophy, parents disciplines and models and immediate discipline have been addressed. Subsequently, we will assess each of the three gaps by reflecting on the elements in the model that affect each gap directly. The tourism development strategy gap is determined by the interplay of the destination identity and the way in which it is projected and translated into the tourism product offering. The tourist demands specifications gap is a result of the discrepancy between the tourist's expectations as embedded in the perceived destination image and the actual place experiences. The perceived tourism destination image is itself influenced by the tourist's identity and self focus, temporal environmental and situational influences and word-of-mouth and mouse. Lastly, the size of the tourism delivery and supply gap depends on the quality of the tourism experience relative to the promised quality of the tourism product offering, its projected image and vicarious place experiences, such as the performance of intermediaries and other sources of produced imagination (e.g. art, literature, popular culture).

In chapters 3 and 4, this dissertation slightly departs from the standard format of research reports, where methodology and results are normally discussed in subsequent chapters. As we approach our research topic from two distinctive perspectives, both, the supply and demand – projected versus perceived image – perspective are discussed in separate chapters. Each chapter, 3 & 4, includes its own references to methodology, analysis and results.

Chapter 3, using a content analysis methodology, will provide an empirical analysis for the top half of the destination image formation model, i.e. the projected destination image. The chapter focuses on the research context of Dubai; one of seven states that together comprise the United Arab Emirates in the Arabian Gulf. For a detailed analysis it is necessary to focus on just one destination, as a comprehensive description of the place identity needs to be provided. Subsequently this chapter will evaluate the projected image through the analysis of the online textual and visual content of tourism websites involved in promoting Dubai.

Chapter 4, using a survey methodology, will provide an empirical analysis for the bottom half of the destination image formation model, i.e. the perceived destination image. First, the inadequacy of prevailing destination image measurement instruments will be illustrated through a survey study that we conducted in The Netherlands. Subsequently, an alternative methodology is presented using online free elicitation of consumer stories about tourist destinations. Several destinations, including Dubai, are compared and contrasted through the content analysis of consumers' accounts. Also, differences among groups of respondents, according to cultural background or other social, personal or psychological characteristics, will be analysed.

Of interest in chapters 3 and 4 is the extent to which global facts take local form. In this sense, we would encourage the reader not to interpret these chapters - and the frequent references to Dubai in this dissertation - as being about the specific case of Dubai. Rather, it is about a typical example of a rapidly developing city state or region, riding the waves of globalisation, having firmly established itself, in less than 15 years, as an important node in the network of global flows. It is not the destination itself that is of central interest, but the results of the phenomenographic analysis of the way in which this newly established tourism destination is projecting itself and being imagined by international travellers online, and the way in which these results are generated. The research background description provides an assessment of the sense of place and facilitates a comparison of the empirical content analysis and survey results with the actual tourism product offering and local identity. The findings resulting from this analysis are likely to be of interest to many developing destinations in the emerging network of global hubs. This will be demonstrated in chapter 5, which will present conclusions based on the empirical data presented and provide an analysis of the significance of the 3 gaps within the context of Dubai. The assessment of the gaps, their nature and reasons for existence will be of interest to many tourist destinations around the world. A possible solution for the bridging of the gaps, toward building brand equity (Aaker 2001; Aaker & Joachimsthaler 2000; Riezebos 1994) in tourism destinations, will be provided with reference to the recently introduced destination branding literature. Finally at the end of chapter 5 we will

present some general conclusions about the scientific relevance of results the contributions made.

2 THEORETICAL BACKGROUND

> *The assertion of any place-bound identity has to rest at some point on the motivational power of tradition. It is difficult however, to maintain any sense of historical continuity in the flux and ephemerality of flexible accumulation. The irony is that tradition is now often preserved by being commodified and marketed as such. The search for roots ends up at worst being produced and marketed as an image, as a simulacrum or pastiche* (Harvey 1989: p. 303).

This chapter will discuss the destination image formation model in more detail, but only after elaborating on the parent and immediate disciplines that influence the formulation of the model. These will be discussed in the first two sections. The three sections that subsequently follow on from that will each cover one of the model's three TDS-gaps that could negatively affect the level of satisfaction experienced in the host – guest encounter: the Tourism Development Strategy gap, the Tourism Delivery and Supply gap, and the Tourist Demands Specifications gap. In each subsection, the relevant components of the model, which play a role in determining the size of the gap, will be elaborated upon and put into perspective in relation to the other components.

2.1 Philosophy, Parent Disciplines and Models

The philosophical foundation for this dissertation can be dated as far back as 1641 when Descartes published his *Meditationes de Prima Philosophia (Meditations on First Philosophy)*. Although Descartes' reasoning is best known for the Latin translation of his expression in the *Discourse*, "*cogito, ergo sum"* ("I think, therefore I am"), it is his theory of 'ideas' which is of particular interest here. Descartes, as the founder of modern philosophy, being the first to approach epistemology from a rationalist (knowledge based on reason) but individualistic perspective, would make him the progenitor of the research ideas presented in this dissertation. Descartes held that there are only three sources from which we derive ideas: all of our ideas are either "adventitious" (entering the mind from the outside world, through sensory information) or "factitious" (manufactured by the mind itself) or "innate" (inscribed on the mind by god) (*Meditations III*). "But I don't yet know that there is an outside world, and I can imagine almost anything, so everything depends on whether god exists and deceives me" (Kemerling 2001, Section. Descartes: God and Human Nature, ¶ Clear and Distinct Ideas). Descartes will then go on to prove that God does exist and is not a deceiver, which means that ideas are either a reflection of reality or created by the mind itself. So ideas may also be considered objectively, as the mental representatives of things that really exist. According to a representative realist like Descartes, then, the connections among our ideas yield truth only when they correspond to the way the world really is; hey presto, a foundation for the concept of 'image' in connection to 'identity' is laid. The minds' (image) interaction with the body or reality (identity) through *experience*, was left by Descartes for others to discover.

Locke, one of these first philosophers to comment on experience, as another representative realist and great philosopher in the UK tradition as opposed to the mainland European tradition, but nevertheless clearly influenced by Descartes in this same era of the

seventeenth century, had similar ideas as he spoke of primary and secondary qualities of objects. "The primary qualities of an object are its intrinsic features, those it really has, including the 'Bulk, Figure, Texture, and Motion' of its parts (*An Essay Concerning Human Understanding, Essay II viii 9* (1690)). The secondary qualities of an object, on the other hand, are nothing in the thing itself but the power to produce in us the ideas of 'Colours, Sounds, Smells, Tastes, etc.' (*Essay II viii 10*) (Kemerling 2001, Section. Locke: The Origin of Ideas, ¶ A Special Problem). But Locke also linked these ideas of identity / character and image / perception, to experience. By experiencing objects the secondary qualities are determined by our sensory organs. As for Locke experience was the only source of knowledge, he was clearly a product of his time, when empiricism emerged as the dominant epistemological foundation. About 50 years later, Hume, in book I of *Treatise of Human Nature* (1739) and *An Enquiry concerning Human Understanding* (1748), would carry this work even further.

But returning to the end of the seventeenth century, Locke also discusses the identity of things in a separate account and interestingly states that to observe identity we may have to rely upon third-person attributions of identity (Kemerling 2001, Section. Locke: Knowledge and its Limits, ¶ Personal Identity). Hence, the idea of projected image is conceived and for this Locke believes that language is an all important vehicle. All this, however, leads to a worrying conclusion by Locke in *Essay IV xi 1-7*, as: "Any effort to achieve genuine knowledge of the natural world must founder on our ignorance of substances. We have 'sensitive knowledge' [knowledge based on sensation, produced by the senses] of the existence of something that causes our present sensory ideas. But we do not have adequate ideas of the real essence of any substance" (Kemerling 2001, Section. Locke: Knowledge and its Limits, ¶ The Extent of Knowledge). And even if we did think that we know the real essence of substances, we would be unable to demonstrate any link between that reality and the sensory ideas it produces in us. So, one will never really know what the actual identity of things is; it's all based on projected and perceived images, and projected images of the perceived images of others, and so on; a perpetuating system of illusion. As Kemerling puts it:

> Many instances of perceptual illusion can be explained by reference to the way secondary qualities depend upon our sensory organs, but the possibility of accurate information about the primary qualities is preserved, at least in principle. The botanical expert may be able to achieve detailed knowledge of the nature of roses, but that knowledge is not necessary for my appreciation of their beauty (Kemerling 2001, Section. Locke: The Origin of Ideas, ¶ A Special Problem).

Pierre Bayle in *Historical and Critical Dictionary* (1697), drives us even further into scepticism as he claims that instances of perceptual illusion also apply to the primary qualities of substances, because who is to say that the botanical expert is right and not deceived by his own senses? Berkeley in *A Treatise concerning the Principles of Knowledge* (1710) offered a solution to this problem by contending that the only thing one can do is to acknowledge that there are no material objects; *Esse est percipi*, "to be is to be perceived". For Berkeley, only the ideas we directly perceive are real. Immaterialism is the only way to protect ourselves against perils of scepticism. It seems that the latter perspective forms the foundation for a virtual world and the Wachowski brothers' movie

the Matrix. Indeed it seems that with technology these days, as illustrated by Go & Fenema's (2003) polyinclusive model of hedonic consumption experiences in chapter 1, one can experience places and objects, without entering material space. It begs the question whether a real physical world remains for purposes of marketing and consumption? Without answering this question here, it appears that Berkeley laid the foundation for phenomenal idealism, which entails that "what we usually describe as physical objects have no reality apart from our individual, private perceptual experiences of them" (Kemerling 2001, Section. A Dictionary of Philosophical Terms and Names, ¶ Phenomenalism).

The ontological question of whether or not there is a material world went on for quite some time, even today, but also during the enlightenment of the Eighteenth century, when it was Kant who forever changed the course of philosophical thinking (Kemerling 2001, Section. Kant: Synthetic A Priori Judgments, ¶ The Critical Philosophy). Very much influenced by the sceptical arguments of Hume, "Kant supposed that the only adequate response would be a 'Copernican Revolution' in philosophy, a recognition that the appearance of the external world depends in some measure upon the position and movement of its observers". Kant's constructivism brought rationalism and empiricism together in his *Critique of Pure Reason* (1781, 1787). He defended that knowledge is created by individuals, through their sensory perceptions of experiences over time and space together with a reasoned interpretation of those "perceived images" and their connections, in order to create inferences for future occurrences. In other words, knowledge and perceived images are personal constructs 'of the knower', dependent on a person's cognitive capacities and personal experiences 'of the known' from certain locations at certain points in time (later this will be referred to as self-focus). But in the end, also Kant, an idealist, failed to find any satisfying answer to the question whether the known exists out there in a material world. Many of his contemporary idealists believed that only mental entities are real, so that physical things exist only in the sense that they are perceived.

Kierkegaard added another interesting insight in his *Afsluttende Uvidenskabelig Efterskrift (Concluding Unscientific Postscript)* (1846) as he emphasised the importance of the subjective truth of the individual, the "appropriate relation between object and knower". "At one level, this amounts to acceptance of something like the slogan, 'It doesn't matter what you believe, so long as you're sincere'" (Kemerling 2001, Section. Kierkegaard: The Passionate Individual, ¶ Subjective Truth). This existentialist view was also shared by Heidegger and Sartre. In one of his lectures from the series *Pragmatism's Theory of Truth* James (1842-1910) added to this that:

> Truth is the characteristic feature of beliefs that tend to help us to be ready for what happens in our experience. That is, belief has a function in the life of human beings—namely, to prepare us for successful action in the face of recurrent circumstances—and beliefs that best fulfil that function are the ones most deserve to be called true (Kemerling 2001, Section. James: Pragmatism and Empiricism, ¶ Pragmatic Truth).

In the late nineteenth century, some philosophers grew dissatisfied with the excessive subjectivity fostered by the philosophy of the later German idealists including Kant.

Borrowing their methods from the emerging sciences of psychology and sociology, these phenomenologists wanted to return to the objectivity of experiential content. The basic approach of phenomenology, under the influence of Hume's empiricism, was first developed by Brentano in his *Psychologie vom empirischen Standpunkt (Psychology from an Empirical Standpoint)* (1874). It consists of a "philosophical method restricted to careful analysis of the intellectual processes of which we are introspectively aware, without making any assumptions about their supposed causal connections to existent external objects" (Kemerling 2001, Section. A Dictionary of Philosophical Terms and Names, ¶ Phenomenology). Later, Husserl, student of Brentano, influenced Heidegger's phenomenology being his teacher. Heidegger, in *The Way Back into the Ground of Metaphysics* (1949), reaches the culmination of this progression of existentialist thought as he states that "there is no abstract essence of human nature; there are only individual human beings unfolding themselves historically". It led him to a conception of human existence as active participation in the world, "being-there" or *Dasein* (Kemerling 2001, Section. Heidegger: Being-There (or Nothing), ¶ The Ground of Metaphysics). Phenomenological psychologists in turn also focus on subjective experience. "This approach seeks to understand events, or phenomena, as they are perceived by the individual and to do so without imposing any preconceptions or theoretical ideas" (Atkinson et al. 1987: p. 10).

Also Moore, in *The Refutation of Idealism* (1903), developed his own approach in which he "maintained that the object of any experience must be clearly distinguished from the experience itself. Indeed, experience itself should be analyzed as an irreducible relation between an external object and the perceiver's conscious awareness of that object" (Kemerling 2001, Section. Moore: Analysis of Common Sense, ¶ 1). Moore emphasised the common sense beliefs that each of us holds about for instance our own body, other human bodies, our own experiences, and the experiences of other human beings. Again the triangle identity-image-experience seemed to re-emerge, although Moore had trouble dealing with the 'mental facts' about conscious experiences. He relied heavily, like Russell and Wittgenstein later, on the analysis of language. Russell's lectures on *Our Knowledge of the External World* (1914) and *Logical Atomism* (1918) took this even further. Russell believed that all human knowledge begins with sensory experiences and for him these sense-data are not merely mental events, but rather the physical effects caused in us by external objects. Various other British and American realists also worked on this issue of perceptual sense-data versus physical objects. The late Wittgenstein in *Philosophical Investigations* (1953) started a movement of philosophy that believed that the analysis of ordinary language of people would dissolve traditional philosophical problems. This analysis or ordinary languages is also the foundation of the methodology of this dissertation as discussed later on in this chapter.

However, in the late nineteenth century, at the time of James' *The Principles of Psychology* (1890), in the US, Psychology began to emerge as an academic discipline independent of philosophy. Some of the body of knowledge that was developed in over a century afterwards, is also relevant for this dissertation as part of the parent disciplines. Particularly the area of cognitive psychology, which studies the processes of perception, memory and information processing, by which individuals acquire knowledge regarding the physical world around them, is of interest. Much of the research on perceived image is

grounded on this vast body of knowledge. Linked back to the philosophy of Kant, constructivism is a particular area of inquiry within the domain of cognitive psychology, which is of particular significance. Constructive memory theory argues that when we perceive something, we use our general knowledge of the world around us to *construct* a more complete description of the event. Our total memory therefore goes beyond the original information given. Humans do this in several ways (Atkinson et al. 1987: p. 272-276): simple inferences; stereotypes (a packet of inferences about the personality traits or physical attributes of a whole class of people) ; and schemata (a mental representation of a class of people, objects, events, or situations). Stereotypes are thus a kind of schema because they represent classes of people. However, schemata can be used to describe not only our knowledge about particular objects and events, but also our knowledge about how to act in certain situations, such as eating in a restaurant or checking in at an airport. By linking schemata to each other in complex networks of inferences, we simplify our cognitive processes. However, the price we pay is that an object or event can be distorted if the schema used to encode it does not quite fit.

Within psychology, the domains of social psychology and environmental psychology are of particular relevance. Environmental psychology deals with "the study of the interaction between people and their environment. Environment within the context of environmental psychology includes the physical environment and well as the social situation" (Fridgen 1984: p. 21). At the same time other commentators would argue that social psychology is a separate field of study where "the job of the social psychologist is probably best seen as explaining how people operate as social psychologists [themselves]; that is, how they make sense of their social world, of the relations between themselves, others, society and its institutions" (Stringer & Pearce 1984). Whether there are two separate fields of study or the one subsumes the other seems to be a fruitless discussion because of course, against the backdrop of tourism, both social and environmental variables are clearly integrated within the same setting. In "Economic Psychology of Travel and Tourism", the editors John Crotts and Fred van Raaij and several contributors, argue that Economic Psychology is a specific branch of social psychology. It deals with consumer preferences, buying behaviour and customer satisfaction (Van Raaij & Crotts 1994: p. 2).

Whereas micro-economics and behavioural psychology assume a direct relationship between stimuli and responses, economic psychology introduces the intervening factor of the subject (person) with its perceptions and preferences. The following passage also seems to indicate a triangle: stimulus (identity of place), perception (image), response (travel experience), as was observed above through the learning of earlier philosophy.

> Stimuli must be perceived and evaluated, before they elicit responses or have an effect on responses. Individuals differ in their perception and evaluation of reality and act according to their perceived/evaluated reality and not to the stimuli as such. Economic perceptions and evaluations are not random deviations from a 'correct' value and will not cancel out at the aggregate level…. Perception, evaluation and expectation can each become an intervening variable between stimulus and response. In addition, after the response (i.e., purchasing behaviour) an evaluation takes place as to whether the vacation expectations were met (Van Raaij & Crotts 1994: p. 7).

Based on the work by Poiesz (1989) in the *Journal of Economic Psychology* and later by Pruyn (1990, Second ed. (1999)), Van Riel (1996: p. 111) examines image as part of the corporate communication domain. There, image is contrasted with identity as well. Particularly, Van Riel classifies images into three groups, based on the level of consumer elaboration, which is determined by the extent to which a subject is involved with an object. Table 2-1 provides an overview of the three levels of consumer elaboration of image and the corresponding conceptualisation, typology and measurement methodologies. Later on in this chapter, many of these methodologies will resurface when discussing the measurement of tourism destination image.

Table 2-1: Three approaches to the concept of image

Level of elaboration	*Conceptualisation*	*Typology*	*Measurement implications*	*Measurement methodology*
High	Image is stored in memory as a network of meanings	Image is a complex structure	Qualitative research: a deeper assessment of associations	Free format methods Structured methods: • Laddering • Kelly Grid
Middle	Image is the weighted sum of beliefs about an object: perceptions about salient attributes X the importance of these attributes	Image is an attitude	Explicit methods: identify the salient attributes and present those in the form of statements	Attitude questionnaires: • Considerations • Appreciations
Low	Image is a general, holistic impression of the place that the object occupies relative to competitors	Image is a broad impression	Implicit methods: relative localisation of the object using multidimensional scaling	Multidimensional scaling of: • Resemblances • Preferences

Note: Translated from *Identiteit en Imago: Grondslagen van corporate communication (Identity and Image: Foundations of corporate communication),* by Van Riel, C.B.M. (1996), (Second ed.), Schoonhoven, The Netherlands: Academic Service, p. 112, which in turn was based on "The image concept: Its place in consumer psychology", by Poiesz, T.B.C. (1989), *Journal of Economic Psychology*, 10 (4), 457-472, , Reprinted with permission from Elsevier.

Within the broader field of social psychology the term 'Image' has had a number of uses (Stringer 1984). Influential accounts have been produced by Boulding (1956) and Boorstin (1962), who indicate that it refers to a reflection or representation of sensory or conceptual information. According to Stringer (1984: p. 149): "In Boulding's sense, the image is built on past experience and governs one's own action. It is not static, nor 'objective' – there is an essential value component. Furthermore, it has social aspects". "Part of our image of the world is the belief that this image is shared by other people like ourselves who are also part of our image of the world" (Boulding 1956: p. 14).

In the 1984 Annals of Tourism Research special issue on environmental and social psychology, Fridgen (1984: p. 20) also stated that "tourism and the environment are inseparable. The relationship between the tourist and the tourist destination site is a person-environment relationship. Travelling is an act of exploration". Fridgen provided an overview of the research areas that are of interest within the domain of environmental psychology (including the social) by applying the conceptual framework of Clawson and Knetsch (1966), who offer a five phase experiential conceptualisation of recreation. In every phase, Fridgen mentions specific areas of research that will also be examined in greater detail in the present chapter.

Table 2-2: Fields of study within environmental psychology in five travel phases

Travel Phase	*Field of study*
1. Anticipation	*Imagery*: Image is a central concept in environmental preference studies and tourism research. Tourists probably use perceived images of people and settings that go beyond the promotional brochure… For potential travellers in this anticipation stage, the image of vacation sites and social situations is a powerful factor within the decision process. Images influence spending patterns, planned length of stay, and planned activity patterns (Fridgen 1984: p. 25-26).
2. Travel to the destination	*Environmental perception en route*: The trip to the destination site takes the traveller through a number of environments each of which is viewed only briefly, often from the capsule of a car or train…, How are images and impressions generated by design, and how can this process give a more effective impact on the tourist passing through.. (Fridgen 1984: p. 27-28)?
3. On-site behaviour	*Authenticity*: Authentic settings are successful and provide satisfaction to the tourist when there is environment-behaviour congruence, a fit between what happens in the setting and what is expected of the setting (Fridgen 1984: p. 30).
4. Return travel	*Environmental perception en route*: Same as phase 2.
5. Recollection	*Perceptions at home*: During the recollection phase of travel, the tourist consolidates impressions and perceptions into memories, emotions, and evaluations. Expectations that initiated the trip are now merged with actual experiences. Shortfalls and achievements are reflected upon and integrated into new images. After travelling, people's attitudes and perceptions of the vacation, the host community, and environment should have changed (Fridgen 1984: p. 32).

Kunkel and Berry (Kunkel & Berry 1968) were some of the first to study image in a service industry setting in the nineteen sixties, in the context of retail store image, from a behavioural psychology and learning perspective. Later on, however, commentators realised that image was more than learned expected reinforcements (stimuli) associated with prior experience. Imagery was described as a distinct way of processing and storing multisensory information in working memory. In essence it is now believed that 'imagery processing' depends upon more holistic, or gestalt, methods of representing information. Imagery processing is often described as mental picturing, although sight is not the only sensory dimension that can be incorporated in it. Imagery can include any or all of the senses - sight, sound, smell, taste and touch (although the latter three are inferior by far (Atkinson et al. 1987: p. 172)). Imagery processing contrasts with 'discursive processing'

which is characterised by pieces of information on individual features or attributes of the stimuli rather than more holistic impressions (Echtner & Ritchie 2003: p. 39; MacInnes & Price 1987). The way image is studied in tourism research is discussed in greater detail later on in this chapter, but first we turn to a review of the immediate discipline within which our own research is placed.

2.2 Immediate Discipline

The present chapter examines in detail the various areas of inquiry that are of immediate concern to this research on destination image. It draws first and foremost on the discipline of strategic marketing at the interface of information and communication technology (ICT from a marketing channel and consumer focus (Van Bruggen 2001)). As illustrated above, an important supporting discipline is economic psychology, particularly as it applies to the fundamentals of cognitive social and environmental psychology. These areas of inquiry will often be applied specifically in the tourism domain but frequently beyond. Most narrowly defined, the centre of gravity in this dissertation is tourism destination image research in an online environment. This relates to the way in which tourism destinations (places) are positioned in the global flows (Castells 1996) - ethnoscapes, technoscapes, mediascapes and ideoscapes (Appadurai 1996). These spaces of globalised experiences, that influence the image and its relationship to the sense of place, need to be understood in order to create effective marketing strategies.

The interdisciplinary field of marketing and ICT probably first emerged when Alvin Toffler introduced the concept of the "Third Wave" in 1980. The Third Wave, after the agricultural and industrial revolution, represented the dawn of the information age. Its emergence had major consequences on the evolution of the marketing discipline for example in the application of the concept of mass-individualisation. To paraphrase Toffler: "demands for participation in management, for shared decision-making, for worker, consumer, and citizen control, and for anticipatory democracy are welling up in nation after nation. New ways of organising along less hierarchical and more ad-hocratic lines are springing up in the most advanced industries" (Toffler 1980: p. 67).

Mass-individualisation resulted in consumers becoming increasingly demanding and versatile (Werthner & Klein 1999: p. 13). It seemed ever more difficult to "retain consumers in the straightjackets of segmentations based on sex, age or social class" (Go et al. 1999: p. 13). As Bloch et al (1996: p. 114) stated: "Consumers wish more frequent, but shorter travel, last minute reservations, global advice, service quality, market transparency, and a certain self-service mentality – e.g. 'modern' travellers begin to gather recreational micro-services on their own and form their customised holiday package. These developments lead to an elimination of non value-adding stages (…but particularly non value-adding players…) in the tourist service systems" and the rise of what Toffler referred to as the "prosumer". Characterised by a self-service mentality, the prosumer has caused the 'do-it-yourself industry' and the self-help movement to explode. New industries were spawn based on collapsed prices and packaging (flat-packs) optimised for 'easy assembly' at home. In addition, production of own goods and services in leisure or rather 'unpaid work' time gained in popularity.

In turn, the mass-customisation movement triggered the need to satisfy these mass-individualised customers through "flexibilisation" (Werthner & Klein 1999: p. 157); that is, the capacity of organisations to respond to the needs of customers in a flexible manner. This concept, with Pine (1993) as the spiritual father, recognised that in mass-individualised markets, mass production no longer worked. Organisations aiming for mass-customisation, utilise a wide variety of specific value chains tailored to the individual product or customer, through the use of loosely linked dynamic networks of players involved in the production and assembly of the product or service on offer. Normann and Ramírez (1993) termed this the 'value constellation', in which the consumer was given a more prominent and central role than in the traditional value chain. All this, of course, was only made possible through technology, as one of the characteristics of dynamic networks is the broad availability of open information systems. Network theory logically explains this co-evolution, as there are only two ways of dealing with complexity in extended multi-player networks (for instance such as in tourism where there are many suppliers and many consumers who have to "cross the information cloud' as Werthner and Klein put it (1999: p. 6)). Reducing complexity in such networks can be achieved through intermediaries, which in the past created the basis for the traditional rigid and extended value chains. Alternatively, ICT can drastically increase the information handling capacity of a network and hence reduce the need for intermediaries and fixed value chains. An explanation of these principles is provided by Van der Heijden (1995) and Werthner and Klein (1999: p. 181).

With the consumer firmly a part of the value constellation, Pine and Gilmore (1998a; 1998b; 1999) heralded the start of a new era: the "experience economy". In the experience economy, business is perceived as a stage and companies must design memorable events for which they even charge admission. However, we tend to agree with Wolff Olins' Director Robert Jones, who criticised Pine and Gilmore's work as of follows: "to posit the arrival of a fourth economic era based on the existence of Chuck E. Cheese's seems to be tendentious. The truth, surely, is that we're still firmly in the service era, that all service companies deliver experiences; and that they always have" (Pine (II) & Gilmore 1998b: p. 173). We would indeed argue that for most businesses, goods are not just props and services the stage in order to sell experiences. Rather, it would seem to be a matter of the hedonic aspects of the consumption of many goods, and the experiential aspects of most services, becoming more important as areas where businesses can achieve competitive advantage as commoditisation of goods and services proliferates. It is interesting to note that marketing researchers (Hirschman & Holbrook 1982; Holbrook 2000; Holbrook & Hirschman 1982) realized the significance of the hedonic and experiential aspects of consumption long before Pine and Gilmore wrote their book. Nevertheless, Pine and Gilmore should be praised for bringing these issues into the spotlight and raising the level of attention that marketers attach to the emotional aspects of consumption, although maybe with some delay, even in non-Anglo-Saxon markets (Piët 2004).

The World Wide Web offers entertainment, games, social play activities and information free of charge, in order to sell goods and services on the side. It attracts millions, its growth is exponential, and is therefore the obvious medium to observe to try to understand how the experience economy operates and unfolds. Since tourism is experiential in nature and the largest and fastest growing online industry, we focus our research on this. However,

one thing we have to keep in mind is that, considering the opportunities provided by technology, but at the same taking into account the digital divide, 'access' is a major issue (McKenna 2002; Rifkin 2001a, b). As Rifkin (2001a: §12 & 13) explains:

> The young people of the new 'protean' generation are comfortable conducting business and engaging in social activity in the worlds of electronic commerce and cyberspace and they adapt easily to the many simulated worlds that make up the cultural economy. Theirs is a world that is more theatrical than ideological and more oriented towards a play ethos than towards a work ethos. For them, access is already a way of life. People of the twenty-first century are as likely to perceive themselves as nodes embedded in networks of shared interests as they are to perceive themselves as autonomous agents in a Darwinian world of competitive survival. For them, personal freedom will be about the right to be included in webs of mutual relationships.

"Simultaneously, the lines of communication between people are owned and controlled by information and communication technology transnational corporations, making access not a privilege but a pre-requisite for participating in culture and community" (Matrix 2002: §2). In the information age, being disconnected is equivalent to being outside the system, invisible, and disempowered. But the same applies to businesses, "for in the new economy access to consumers… is becoming more important to a company's bottom line than selling actual products" (Straus 2000: §16). Therefore, Shapiro and Varian's book "Information Rules", published in 1999, was timely. Shapiro and Varian (1999) discussed how to deal with the network economy in the information age, while maintaining that the fundamental economic principles of competition and business success had not changed dramatically. We tend to agree with Shapiro and Varian when they argue that the most important question to be answered is how to "lock-in" your customers.

Slowly but surely management decision-makers are beginning to realize that collecting mountains of information about customers may contribute little to gain their loyalty. Instead, a recent school of thought holds that there is a need for a renewed social interaction between companies and their customers, as well as customers with other customers. Prahalad and Ramaswamy (2000) argue that today, businesses need to co-opt customer competence (supported by (Molenaar 1996)). "Thanks largely to the Internet,… individual consumers can now address and learn about businesses either on their own or through the collective knowledge of other customers. Consumers can now initiate the dialogue; they have moved out of the audience and onto the stage" (Prahalad & Ramaswamy 2000: p. 80). Consumers have become co-creators, who "are not prepared to accept experiences fabricated by companies. Increasingly, they want to shape those experiences themselves, both individually and with experts or other customers" (Prahalad & Ramaswamy 2000: p. 83). Thomke and Von Hippel (2002) argue that organisations should involve customers into their research and development processes. A direct dialogue with customers seems the only way in which to find out what customers really think. Zaltman (2002: p. 26) argues that many customers "don't know what they think", so surveys, focus groups and data-mining only scratch the surface. Businesses also need to probe the subconscious mind, which has a large impact on consumer decision-making. The best way to do this seems to be to incorporate 'customers as innovators' into companies'

extended enterprise value constellations (Normann & Ramírez 1993; Thomke & Von Hippel 2002). This particularly holds true for industries where the following characteristics apply: industries where market segments are shrinking and customers are increasingly asking for customized products; industries where customers and suppliers require an intense dialogue to find a solution and where some customers complain that products do not match requirements and response is too slow; and lastly, industries where competitors use high-quality computer-based simulation and rapid-prototyping tools internally to develop new products (Thomke & Von Hippel 2002: p. 77).

We would argue that most of these characteristics apply to the travel and tourism industry as well. So how can the industry co-opt customers? Again, it appears to be evident that technology plays a central role. Provide consumers with the full functionality of user-friendly Global Distribution System (GDS) access, fully linked to property and revenue management systems of all suppliers, and travellers will create their own packaged holidays. Trends towards this ideal situation can already be observed online with any of the major cybermediaries (which they refer to as "dynamic packaging" (Davies 2004)). An important core competency on which to compete in future will be an organisation's ability to utilise customers as a source of competence and encourage active dialogue with customers and between customers. Virtual communities; collaborative filtering leveraging the online community to make personalized recommendations; and viral marketing (Sweet 2005) are some of the tools that are used today in order to co-opt customer competence and "embrace the market as a forum" (Prahalad & Ramaswamy 2000: p. 83).

The logical final consideration in this progression of technology at the interface of marketing is the concern for "the human moment" (Hallowell 1999), i.e. the physical social interaction between people, and the integration of "the physical and the virtual" (Huang 2001: p. 150) and an emphasis on the "relationscape" (Pruyn 2002: p. 27). "People enjoy and need social and sensual contact, they don't want to be disembodied" (Huang 2001: p. 149) and "for businesses to do well, you can't have high tech, without high touch" (Hallowell 1999: p. 64). This is supported in the information management literature, where there is a call for "a third rationale of information systems in which trust, social capital, and collaborative relationships become the key concepts of interpretation" (Kumar & Dissel 1998: p. 199). Relationships are "the accumulation of past experiences and consequences of future expectations [i.e. image]" (Kumar & Dissel 1998: p. 214). In collaborative relationships, "bonds, or the 'tying' between partners" (Kumar & Dissel 1998: p. 214), become important elements. "The informational elements of the bond are highly dependent upon the 'meaning' attached to information, which itself is also culturally dependent. Meaning is not something that is transmitted, but arises and changes in the use of words. Finally, since meaning is inherently social (i.e. intersubjective),… the social aspects of bonds may be a significant factor" (Kumar & Dissel 1998: p. 214-215). In addition, mutual trust is an important element in building social communities, but "trust does not reside in IT/IS" (Kumar & Dissel 1998: p. 215).

Earlier, Van der Heijden (1995), who based his analysis on transaction cost theory, argued that information technology can reduce transaction cost in dynamic networks and hence reduce the need for stable long term relationships with a limited number of intermediaries. As a result of increased information processing power, flexible relationships with an

increasing number of actors are possible, and have led to disintermediation. However, it raises the issue whether a sole focus on transaction cost reduction within particular business contexts results in a sustainable competitive position, when aspects of the social bonds and trust are disregarded. Kelly (1999, quoted in; Werthner & Klein 1999) argues that in the new economy "wealth is not gained by perfecting the known, but by imperfectly seizing the unknown". Or Nooteboom (2000: p. 104), more specifically: "A fundamental shortcoming of transaction cost economics is its static nature and exclusion of innovation". Within a network context it is important to recognize that "people and firms, require outside sources of complementary cognition to complement their own biased and myopic cognition" (Nooteboom 2000: p. 104). A corollary of the interdependence within networks is the need for and significance of including trust in the theory formation in order to facilitate interaction and the social aspects of bonding culminating in relationships (Kumar & Dissel 1998: p. 214-215). For this, computer mediated communication is not a panacea (Fenema 2002: p. 543).

Is it coincidental that those applications on the internet that have become most popular in recent years, are the ones that facilitate social interaction? 'Click-to-talk', online forums, virtual communities, instant messaging, free webmail, and, of course, blogging have rapidly gained ground. According to Pew Internet & American Life (Lenhart et al. 2004) "44% of Internet users have created content for the online world through building or posting to Web sites, creating blogs [short for web logs], and sharing files". According to Technorati "the size of the blogosphere has doubled every five months over the last year and a half" and according to Pew Internet & American Life "a new weblog is created every 5.8 seconds. That roughly translates into 15,000 new blogs every day" (McGann 2004). 2004 even "saw the establishment of the Word of Mouth Marketing Association (WOMMA), and a New York Times Magazine cover story on buzz marketing" (Blackshaw 2004; Sweet 2005). Among travellers the same trend is emerging with online travel blogs gaining popularity as well (Saranow 2004). "Companies have been racing to capitalize on the popularity of travel blogs. In September 2004, MyTripJournal.com began letting visitors browse other travellers' journals using a more-advanced keyword system…. Even the big travel-guidebook companies are getting into the act. Earlier in 2004, Lonely Planet Publications' web site apparently began offering a personal-trip-account tool provided by MyTripJournal.com, and launched blogs written by its guidebook authors on assignment" (Saranow 2004). Apart form just blogs, virtual travel communities themselves have become popular and a rich source of information for travellers, with the added benefit of being able to share experiences, ask questions in richly populated forums and communicate one-on-one with other members (Wang & Fesenmaier 2002, 2003, 2004, in press; Wang et al. 2002).

What emerges, is a move away from the one-way 'push' process of mass communication and fixed channels, to a situation where image creation is a dynamic interactive process of sharing, reflecting, selecting, debating and experiencing (Molenaar 1996, 2002). This is done at the individual level and in micro-segments. All this was already prophesised by Toffler in 1980 (p. 165) as he stated that:

> The Third Wave thus begins a truly new era - the age of the de-massified media. A new info-sphere is emerging along-side the new techno-sphere. And this will

> have a far-reaching impact on the most important sphere of all, the one inside our skulls. For taken together, these changes revolutionize our images of the world and our ability to make sense of it.

This above evolution has relevant implications for tourism. ICT is a natural partner for a world-wide networked information intensive industry such as tourism (Sheldon 1997; Werthner & Klein 1999: section 1.5). Also Go and Haywood (2003: p. 88) argue that "as a result of advances in information and communication technology, tourism, hospitality and recreation are becoming increasingly integrated within the experience-economy context". In this new networked economy with de-massified media, branding, identity and image take centre stage (Piët 2004; Pine (II) & Gilmore 1998a, b, 1999; Rifkin 2001b; Shapiro & Varian 1999).

Over the years the body of literature on destination image has grown to a respectable size (a synoptic overview being provided by Gallarza et al. (2002) as well as Pike (2002) who reviewed 142 papers). However, as Baloglu and McCleary (1999: p. 869) suggest "most studies have largely focused on its static structure by examining the relationship between image and behaviour", from a construct measurement perspective. Studies have concentrated on the relationship between destination image and: destination preference and visitation intention; destination familiarity and the impact of previous visitation; tourists geographical locations; trip purpose; situational or temporal influences; the image as projected by the destination; and tourists' socio-demographical variables. "Little empirical research has focused on how image is actually formed,…analysing its dynamic nature by investigating the influences on its structure and formation…, especially in the absence of previous experience with a destination" (Baloglu & McCleary 1999). What we would like to take away from the above discussion is that in the networked information society and the experience economy, it is exactly this dynamic nature of destination image which is of key importance. Because like Toffler (1980: p. 301) argues that: "in our modern world we cannot see the future in the same way we solve problems - by dismantling problems into their component parts. We must practice, instead, synthesis".

Figure 2-1 therefore tries to deconstruct destination image formation and identify those elements hat have a dynamic influence on how destination image is formulated in the mind of the consumer. This model provides the basis for the detailed synthesis of the destination image paradigm, as addressed throughout this dissertation from a strategic destination marketing point of view. This is done from a '3-TDS' gap perspective, confronting host-guest (supply and demand) perspectives, based on the idea of the 5-gap service quality analysis model by Parasuraman et al. (1985: p. 44)). The model will be the source of reference for a detailed discussion in the rest of this chapter.

2.3 Tourism Development Strategy

At destination management level, the DMO and local government, in partnership with the private sector, create the tourism development strategy. This involves the evaluation, (re)assembling, (re)positioning and (re)formulation of the tourism product offering, its branding and communication strategies. The first step in this process is the identification of sustainable competitive advantages. One of these competitive advantages could well be the

local culture, particularly when visitors are from diverse cultural backgrounds. The uniqueness of a local culture, as well as the destination's physical resources, can be added attractions that are difficult to copy by rivals (Anholt 2002; Gnoth 2002: p. 266; Ritchie & Crouch 2003: p. 115).

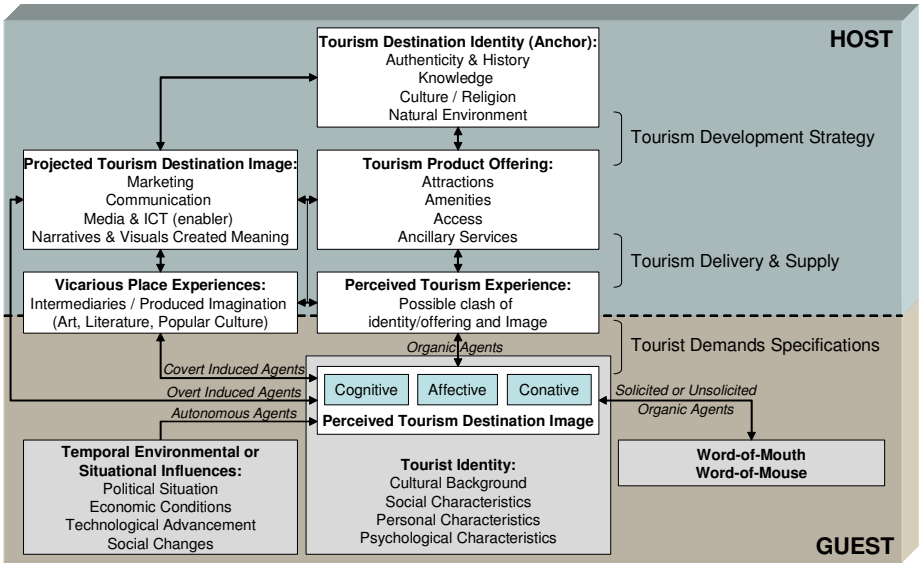


Figure 2-1: The 3-gap Tourism Destination Image Formation Model.
Originated from the basic idea of the 5-gap service quality analysis model by Parasuraman (1985: p. 44) and major contributions from Baloglu and McCleary (1999), Fesenmaier and MacKay (1996) and Gartner (1993).

2.3.1 Tourism Destination Identity as Sustainable Competitive Advantage

Sustainable competitive advantage is generally based on either core competencies or unique resources that are superior to those possessed by competitors and difficult to imitate (Aaker 2001: p. 141; Johnson & Scholes 1999: p. 153). For a tourist destination, superior resources, which might be difficult for competing destinations to imitate, are generally to be found in both its unique natural environment (climate, wildlife or landscape) and its cultural heritage: a destination's physical assets, sites reflecting its roots in terms of a rich history, religion, or other cultural expressions such as the arts, architecture and design. Competitive advantage might however also be created through core competencies: the host community's existing unique capabilities in attracting potential visitors and hosting them during their stay. Co-creation of knowledge is a key element in this respect, be it expressed or tacit. Knowledge contained within the host community can play a vital role such as for instance in the form of a destination's ability to stage world class events or festivals, exhibitions and conferences; the ability to exploit its folklore and prevailing traditions (maybe a long standing tradition of hospitality or a service culture), but also its modern culture, art and architecture (Cooper et al. 2000). This set of competitive advantages is

what could be referred to as the destination's identity or the tourism product offering's anchor.

Identity and Culture

A field of study within strategic marketing, which should be of interest here, is the corporate identity domain. Van Riel (1996: p. 34: translated from Dutch) defined corporate identity as: "the self presentation of an organisation: the implicit and explicit offering of cues, with which an organisation reveals its own unique characteristics through its behaviour, communication and symbolism". Noordman (2004: Chapter 8) attempted to translate the corporate communications literature to place marketing, but immediately identified a significant problem. As the lexicographic trace of the word corpus in corporation suggests, these involve single bodies that can easily define their purpose in society out of a centrally controlled vision and clear objectives, which can often be reduced back to dominating goals such as profit maximisation. Of course, municipalities, regions or countries consist of a plurality of players and interest groups serving many different purposes in society. Even if governing bodies were able to reduce their central objectives to only three – creating employment and a comfortable environment for residents to live in and for visitors to enjoy – even then, visions and missions and ways in which to achieve them, would often change because of political shifts or power struggles. On top of that, many private parties also influence this process and interfere with their own ideas about place identity and how to project it. Nevertheless, Noordman was able to identify several elements that define place identity as listed in Table 2-3.

Table 2-3: Constructive elements of identity

Structural	*Semi-static*	*Colouring*
Location	Size	Symbolism
History	Physical Appearance	Behaviour
	Inner Mentality	Communication

Note: Translated from *Cultuur in de Citymarketing* by Noordman, T.B.J., (2004), Den Haag: Elsevier / Reed Business Publications, Chapter 8.

We tend to share Noordman's critique concerning the many towns, cities and regions that seem to think that they can change their identity by simply changing colour; a new logo, a new marketing campaign and maybe new management. Unfortunately it is not that simple. As Van Riel's definition of identity above (1996) only makes particular reference to the colouring elements, it seems to suggest that it is easier for corporations to adjust their identity together with its structural and semi-static elements, than it is for a city, town or geographical region. It is relatively easy for a corporation to change its location, size, physical appearance (architecture) and even its history (through mergers or acquisitions). The inner mentality is probably hardest to influence; same as with the other semi-static elements that take generations to alter when it comes to place identity (Noordman 2004: Chapter 8).

Van Rekom (1994a; 1994b) elaborated on the concept of identity in the area of tourism and emphasises the role of employees as they contribute largely to an organisation's or

place identity in their interaction with customers. So, besides known aspects of identity, such as communication and signs and symbols, behaviour by the people involved in the expression of the identity of a given object, is an important aspect. As tourism is a high-touch industry, as we will see later, it seems fair to emphasise the role of employees as well as local residents. At the level of a tourism destination, this could be translated into the involvement of a host culture, such as contended by Keilor and Hult. "National identity is the extent to which a given culture recognizes and identifies with its unique characteristics…Thus, national identity becomes the 'set of meanings' owned by a given culture which sets it apart from other cultures" (Keillor & Hult 1999: p. 67).

As Pritchard and Morgan (Morgan & Pritchard 1998; 2001) explain, place identities are constructed through historical, political and cultural discourses and are influenced by decision-making processes and power struggles. National, cultural, natural, social and religious assets become important identifiers. In fact, with reference to the research context of this study, as presented in chapter 3, "in most parts of the Asia-Pacific, a country's cultural and religious heritage is considered a touristic asset, to be proudly explained to visitors. Religious and cultural diversity is as important to a country's tourism product as its culinary diversity, heritage and flora, fauna and wildlife" (Muqbil 2004b). Jeong and Almeida Santes (2004) emphasise the role of festivals as a means to reconstruct, reframe and promote regional identities. They see festivals as a means to provide a link between culture and politics. "A vehicle through which people can advocate or contest certain notions of identity and ideology…. They occur in specific localities and offer representations of certain elements of those localities, resulting in the creation of a powerful sense of place" (Jeong & Almeida Santos 2004: p. 642). They argue that festivals provide political power, a means for social control, to include and exclude certain groups and thus affect the contested meaning of place. At the same time Jeong and Almeida Santes (2004) assert that it provides the opportunity to commoditise local culture for tourism in a globalised economy. This is supported by Ashworth (1991: p. 10) who states that "the closest analogy is to regard the relics and events of the past as a raw material which is selectively quarried and used in accordance with contemporary requirements. The past is therefore commodified in a modern industry for modern consumption". These considerations will be discussed in more detail in the next few sections, but first the issue of place identity needs further elaboration.

Pritchard and Morgan (2001: p. 177), in their study of Welsh identity, argue that: "the meaning and representation of Wales as a tourism space is shifting and its identity is contested as a consequence of changing socio-cultural discourses and of struggles among and between its marketers (the mediators) and its consumers". In other words, identity is constructed, negotiated and renegotiated according to socio-cultural dynamics. Jeong and Almeida Santes (2004: p. 653) agree with this as they found that cultural politics play an important role in defining the local identity of place through festivals. They illustrate "the essentially political nature of place identity, not only in the sense that traditional place identity benefits some groups more than others, but also in that it involves a variety of conflicting ideologies". Festivals can function "as a mechanism for particular groups to consolidate their privileged social status by controlling who participates in the construction of regional identity". As (Castells 1996: p. 476) argues: because of the central role of the media in the network society "image making is power-making". Nevertheless, this study

will often refer to the 'true identity of place', with which we mean to include the full set of unique characteristics or set of meanings that exist in a place and its culture at a given point in time, nevertheless, realising that this identity is subject to change and might include various fragmented identities. In any case, it is argued that if the right expectations are to be created in the minds of potential visitors, and to avoid unpleasant surprises, the "true identity of place" should be the foundation on which to build the tourism proposition.

Nevertheless, this true identity of place can be built on a plurality of different cultural identities, as "identity is not a zero-sum game". This was the main message in the UNDP's 2004 Human Development Report, which was issued in Belgium on July 15, 2004. It states that managing cultural diversity is a challenge for almost any country. 5,000 ethnic groups are crammed into less than 200 countries. "Two thirds have at least one substantial minority—an ethnic or religious group that makes up at least 10% of the population" (Fukuda-Parr 2004: p. 2). This can be a great asset for tourism. The examples of Belgium, Canada, India, Spain, South Africa, amongst many others, demonstrate that not only is it possible to have unity with diversity, and stability with cultural freedom, but multicultural societies in themselves offer positive opportunities to build culturally richer, more vibrant communities (Muqbil 2004a). Identifying this, the report therefore "provides a powerful argument for finding ways to 'delight in our differences', as Archbishop Desmond Tutu has put it" (Fukuda-Parr 2004: p. V).

The actual tourism product or supply in terms of amenities, access, ancillary services, and particularly attractions [including heritage attractions] (Cooper et al. 2000), should be anchored on these unique destination identities. Without such an anchor the sustainability and quality of tourism development might come into question, as any success in attracting international visits would result in other destinations copying the success formula and any competitive advantage being leveraged, or otherwise be perceived by visitors as artificial or fake. This tourism product and the way it is based on the destination's identity, is referred to by Go and Fenema (2003) as the material space of tourism. "Material space can be considered as the…(tourist's)...main environment for experiences". Tourists visit places for a limited time period and move to other sites sequentially, as man can physically be present in only one place at a time. Therefore the 'real' tourism experiences are limited and the tourism development strategy needs to be planned carefully if the tourism product offering is to provide the tourist with an experience that provides the opportunity for the tourist to absorb the true meaning of place. "This is why identities are so important, and ultimately, so powerful in this ever-changing power structure – because they build interests, values and projects, around experience, and refuse to dissolve by establishing specific connections between nature, history, geography and culture" (Castells 1997: p. 360)

Authenticity

The extent to which this identity of place can be experienced in 'reality' (Dietvorst & Ashworth 1995: p. 7), i.e. to what degree tourism environments are authentic, has been thoroughly discussed in literature. As already indicated above, it is often contended that tourism leads to commoditisation. One of the first commentators to assert this observation was Greenwood (1977). "The critical issue is that commoditization allegedly changes the

meaning of cultural products and of human relations, making them eventually meaningless" (Cohen 1988: p. 372). "We already know from world-wide experience that local culture... is altered and often destroyed by the treatment of it as a touristic attraction. It is made meaningless to the people who once believed in it…" (Greenwood 1977: p. 131). Commoditization is said to destroy the authenticity of local cultural products and human relations; instead a surrogate, covert "staged authenticity" (MacCannell 1973) emerges. More recently Jansen-Verbeke went on to state that: "the trend of cultural consumption is seen by many as a threat in terms of its erosive effect on cultural values and identity. In fact, tourism can mutate culture and heritage in an irreversible way. This means that authenticity has become a lost paradise and is being replaced by virtual experiences" (Jansen-Verbeke 2004: p. 6). This process of moving from authentic to inauthentic has been illustrated by Ashworth and Dietvorst (1995) as they link the concept to Butler's (1980) tourism product life cycle.

> In the most usually envisaged scenario, development starts with small visitor numbers of explorer type looking for 'unspoilt' environments and asking for modest, 'place-authentic', facilities. At this stage the attractiveness of the place or region is that it has been as yet almost unchanged by external influences. The growth is demand-led with little consideration of a predetermined place-management strategy. Subsequently local initiatives begin to provide specific facilities for the visitors and some entrepreneurs start intervening in the market by, for example, advertising the region. The increasing number of visitors begins to take resources away from other uses and to impose new pressures upon natural and cultural environments. The important point is reached where the transition occurs from demand-led to supply-led growth which in turn creates a need and an awareness of intervention, whether from inside or outside the place concerned and whether initiated by public or private agencies (Ashworth & Dietvorst 1995: p. 333).

In these later stages the tourist experience is likely to become less authentic. This idea can be linked to Plog's (1974; 2001) work on the rise and fall of destination areas. Plog links Butler's product life cycle to the psychographic analysis of the tourist. Allocentrics (or Venturers) tend to be the ones visiting destinations during the early stage in the product life cycle. As a destination develops it seems to become more attractive to Psychocentrics (or Dependables). When Boorstin (1962) contends that tourists in general do not even wish to experience reality but thrive on pseudo-events, that are inauthentic, contrived attractions and disregarding the real world, he seems to be referring particularly to Plog's allocentric travellers. Although the allocentric – psychocentric dichotomy seems to be an oversimplification, as destinations often attract different kinds of travellers and people shift between roles, if one accepts the implications of the product life cycle models, authentic place experiences are doomed with extinction. As Duncan (1978: 277 cited by (Urry 2003: p. 10)) states: "Over time the images generated within tourism come to constitute a self-perpetuating system of illusions, which may appear as quaint to the local inhabitants as they do to the tourists themselves". MacCannell introduced the concept of "staged authenticity" when he argues that the tourist is deceived in his quest for authentic place identity consumption experiences. "It is always possible that what is taken to be entry into

a back region is really entry into a front region that has been totally set up in advance for tourist visitation" (MacCannell 1999: p. 101).

"To the degree that this packaging alters the nature of the product, the authenticity sought by the visitor becomes 'staged authenticity' provided by the touree" (MacCannell 1973: p. 596). But, as Urry (2003: p. 11) indicates, "the search for authenticity is too simple a foundation for explaining contemporary tourism. There are multiple discourses and processes of the 'authentic'", that are likely to expand further in future as a result of the continuous contest between the virtual revolution and the evolution of the cultural identity of place. As Cohen-Hattab & Kerber (2004: p. 59) argue: "For the tourist seeking identification with a particular religious, historical or nationalist representation, concerns about authenticity and inauthenticity are often superseded by the ability of a site to condense the complexities of region and history into a cohesive, captivating narrative". Instead of arguing around the dichotomy of whether place experiences are authentic or not, or moving in an inevitably destructive direction, we think that it might be more fruitful to consider authenticity as a moving target which can possibly be reconstructed. Kitchin (2003: p. 7) supports this notion as he states that "authenticity is not about conceptual simplicity, it's about people co-creating things that matter to them". Cohen (1988: p. 383) eventually arrives at a similar observation as he concludes that hosts and guests or "performers and audience [in his own words]…willingly, even if often unconsciously, participate playfully in a game of 'as if', pretending that a contrived product is authentic, even if deep down they are not convinced of its authenticity". What might result is a process of "emergent authenticity…as tourist-oriented products frequently acquire new meanings for the locals, as they become a diacritical mark of their ethnic or cultural identity, a vehicle of self- representation before an external public" (Cohen 1988: p. 380 & 383) as a manifestation of the "invention of tradition" (Featherstone & Lash 1995: p. 12). The latter is the direction in which this thesis tends to progress. This will be illustrated in more detail later in chapters 3 and 4.

Globalisation versus Localisation

> [Historically], people occupied narrowly circumscribed areas that represented mostly 'closed communities', which were isolated from other groups of people. The course of human history was changed when capitalism laid the foundations for technological culture. Capitalism required a world market for its goods; hence it broke the isolation of the closed communities and 'feudal society'. The expansion of capitalism was fuelled by the accumulation for accumulation's sake. It implied the annihilation of space by time and posed the question of how and by what means space can be used, organised, created and dominated to facilitate the circulation of capital" ((Harvey 1985: p. 37) in (Van Keken & Go 2004)).

The twin forces of globalisation and technological innovation have put considerable pressure on institutions in the recreation and tourism sector to achieve advances by moving to new products and new processes (Go & Govers 1997b). As a consequence of these developments, the trend towards more concentration has gathered momentum in the recreation and tourism sector through mergers, acquisitions and joint ventures, both nationally and internationally (Go & Pine 1995). "The growing concentration of corporate

power in the hands of fewer companies has lead to more capital intensity and caused intense competition" (Go et al. 1999: p. 13).

As a result and as stated earlier, destination identity is, of course, also subject to pressures of globalisation. Prevailing traditions become history and local modern art and architecture lose their significance in the face of globalisation. Issues of global standards versus local uniqueness, McDonaldisation (Ritzer 1998) versus localisation, become increasingly important, particularly as ICT and improved access and efficiency of international travel make the world a smaller place. As McCabe and Stokoe (2004: p. 602) state: "The impact of globalization on contemporary societies in the production and consumption of place has profound implications for understanding identity and the social self in tourism studies". As stated in the UNDP's 2004 Human Development Report, what is also important in this era of globalisation is that "a new class of political claims and demands has emerged from individuals, communities and countries feeling that their local cultures are being swept away" (Fukuda-Parr 2004: p. 1)

Considering the influence of mass media on destination image, as will be illustrated throughout this dissertation, the UNDP report addresses many of the aspects of globalisation which are of relevance to the travel and tourism industry. For instance:

> In the film industry US productions regularly account for about 85% of film audiences worldwide. In the audiovisual trade, with just the European Union, the United States had an $8.1 billion surplus in 2000, divided equally between films and television rights….Of global production of more than 3,000 films a year Hollywood accounted for more than 35% of total industry revenues. Furthermore, in 1994–98, in 66 of 73 countries with data, the United States was the first or second major country of origin of imported films (Fukuda-Parr 2004: p. 86).

However, Appadurai (1996: p. 32) argues that globalisation leads to a tension between cultural homogenisation and cultural heterogenisation. "Most often, the homogenization argument subspeciates into either an argument about Americanization or an argument about commoditization.... What these arguments fail to consider is that at least as rapidly as forces from various metropolises are brought into new societies they tend to become indigenized in one or another way" (Appadurai 1996: p. 32). This would relate closely to the 'emergent authenticity' arguments presented earlier and hence lead to heterogenisation.

Harvey (1989) also comments on globalisation and post-modernity, in which in economic terms flexible accumulation, "marked by a direct confrontation with the rigidities of Fordism, resting on flexibility with respect to labour processes, labour markets, products and patterns of consumption" (Harvey 1989: p. 147), is the standard. Harvey's view involves a time-space perspective. "As spatial barriers diminish so we become much more sensitized to what the world's spaces contain…. Then it is possible for the peoples and powers that command those spaces to alter them in such a way as to be more rather than less attractive to highly mobile capital. Local ruling elites can, for example, implement strategies for local labour control, of skill enhancement, of infrastructural provision, of tax policy, state regulation, and so on, in order to attract development within their particular space…. Corporatist forms of governance can flourish in such spaces, and themselves take

on entrepreneurial roles in the production of favourable business climates and other special qualities" (Harvey 1989: p. 294). As we will see in the research background description in chapter 3, Dubai is a prime example of this.

At the same time, Harvey (1989: p. 302) argues that we "encounter the opposite reaction that can best be summed up as the search for personal or collective identity, the search for secure moorings in a shifting world. Place-identity, in this collage of superimposed spatial images that implode in upon us, becomes an important issue". Later Harvey (1989: p. 303) goes on to say that:

> The consequent dilemmas of working-class movements in the face of universalising capitalism are shared by other oppositional groups – racial minorities, colonized people, women, etc. – who are relatively empowered to organise in place but disempowered when it comes to organising over space. In clinging, often of necessity, to a place-bound identity, however, such oppositional movements become a part of the very fragmentation which a mobile capitalism and flexible accumulation can feed upon.

Therefore, "the relationship between the space of flows and the space of places, between simultaneous globalization and localization" (Castells 1996: p. 425), the sense of local landscapes versus global ethnoscapes, mediascape, technoscapes, financescapes, and ideoscapes (Appadurai 1996: p. 33) is of prime interest in this context of tourism image. There is growing awareness that places can build on their cultural heritage through tourism and develop modern urban functions that are linked to the demands of the global knowledge economy (Go et al. 2004). For example, as will be illustrated with our research context in chapter 3, through information technology free-zone projects such as developed by Dubai's Internet City. Also in Dubai the 'Knowledge Village' has been designed to become an instrument and integral part of fostering renewal and innovation in the region, through franchised (Western) education and e-learning. It signals that Dubai has geared up to accommodate the international flow of goods, information and people. In short, in many respects it has become both mobile and global.

However, as suggested by Harvey (1989: p. 303) at the beginning of this chapter: "the assertion of any place-bound identity has to rest at some point on the motivational power of tradition" [see Hall (1996) later in section 2.3.2 page 47]. "It is difficult however, to maintain any sense of historical continuity in the flux and ephemerality of flexible accumulation. The irony is that tradition is now often preserved by being commodified and marketed as such". As Appadurai (1996: p. 85) suggests: "the aesthetic of the ephemerality becomes the civilizing counterpart of flexible accumulation, and the work of the imagination is to link the ephemerality of goods with the pleasures of the senses". At the same time "there are abundant signs that localism and nationalism have become stronger precisely, because of the quest for the security that place always offers in the midst of all the shifting that flexible accumulation implies. The resurgence of geopolitics… [i.e. the second Gulf war] fits only too well with a world that is increasingly nourished intellectually and politically by a vast flux of ephemeral images" (Harvey 1989: p. 306); ephemeral images that surely have their impact on places as tourism destinations.

Tourism and globalisation are closely linked, particularly as the travel and tourism industry is subjected to a process of increased internationalisation. For example, the globalisation strategies in the hospitality industry (Go & Pine 1995) and the international expansion and mergers and acquisitions of tour operators and airlines, are driving this forward. Multinational companies in the tourism industry are increasingly standardising products and services, ignorant of the local environment within which they are placed, opposing local social conditions as illustrated above by Harvey. In contemporary society, it matters little where you are in the world, hotels 'look-a-like', from one place to the next, even if they are continents apart. It is not surprising that this is the case in the hospitality and transport industry, where employment is highly internationalised. Most hotel chains attract management level recruits from the same well-known hotel schools in Switzerland, the UK, US and the Netherlands. Cheaper labour is increasingly attracted from hotel schools in India, China and the Philippines. Once employed, staff members are often relocated from one part of the world to the next, every few years. Working many hours at or staying extensively in hotels, tends to lock both guests and workers into their own narrow professional community and industry environment. It may lead to a sense of social exclusion. Hence, it is evident that contextualising the globally standardised products and services within the local environment, seems an almost impossible task and many hotels and resorts seem to be small simulacra islands on their own. Jakle terms this the production of 'commonplaceness'(quoted in Urry 2002: p. 55). In his chapter 4, Urry (2002) himself elaborates on this tension between, on the one hand, the provision of standardised services by the often relatively poorly paid (foreign) service workers who have no bond with the local environment and, on the other hand, the almost sacred quality of the visitors' gaze on some longed-for and remarkable tourist site, which by definition is embedded within a local context. The results in Chapter 3, within the research context of Dubai, show some striking examples of this.

So, the advances in mass media and transportation, increased movement of people, ideas, and capital, and the spread of new technology, seem to thrust us towards a new 'world culture' (Dredge & Jenkins 2003; Reiser 2003: p. 311). But as Reiser puts it: "tourism needs local culture, or at least the image of it (e.g. differentiation between destinations)". It is the cultural identity of place that represents the attractiveness of the tourism product, adding to the tourist's unique experience of a particular destination. But at the same time, as a result of globalisation, the assets of cultural and religious heritage that attract tourists can "become liabilities if they become a source of conflict" (Muqbil 2004b). Huntington (1993: p. 22) stated:

> It is my hypothesis that the fundamental source of conflict in this new world will not be primarily ideological or primarily economic. The great divisions among humankind and the dominating source of conflict will be cultural. Nation states will remain the most powerful actors in world affairs, but the principal conflicts of global politics will occur between nations and groups of different civilizations. The clash of civilizations will dominate global politics. The fault lines between civilizations will be the battle lines of the future.

The question remains as to whether and to what extent post-modern cities in the orient, such as for instance Dubai, or the multicultural metropolitan areas in the West for that

matter, will be affected by such conflicting movements of globalisation, localisation, clashes of civilisation (as according to Magala (2002) modern globalised "detraditionalisation" can lead to fundamentalism) and the competing power struggles and political processes that attempt to define identities of place. The logical question that follows on from that is how this will be reflected in the projected images of place.

2.3.2 Projected Tourism Destination Image

The tourism development strategy results in a projected tourism destination image, through the use of planned marketing and communication. Narratives and visuals are used to create meaning in the market, deploying media and ICT as enablers (Magala 2001). Indirectly, destinations can influence image formation through secondary place interactions with consumers, "vicarious experiences" (Kim & Richardson 2003) facilitated by intermediaries and produced imagination, such as for instance in some of the media, literature, arts, and popular culture (e.g. motion pictures, TV-shows or music) (Cohen-Hattab & Kerber 2004). Gartner (1993: p. 197-201) calls these "induced destination image formation agents" ("overt" and "covert").

Beerli and Martín (2004a: p. 667), based on the work of Gartner, tried to measure the impact on destination image of nine secondary information sources: induced sources (tourist brochures issued by the destination's public authorities, tour operator brochures, mass-media advertising campaigns, travel agency staff, and Internet); organic sources (friends and family members who were either requested or who volunteered to give information about the destination); and autonomous sources (guidebooks, news, articles, reports, documentaries and programs about the destination in the media). Organic and autonomous sources will be discussed later, but Beerli and Martín found that, as far as the induced sources is concerned, there was little impact on perceived image. However, a major drawback of their study is that they measured post-visit, as opposed to pre-visit, image. Of course, it is not surprising that, if a tourist has just spent one or two weeks in a destination, their perceived image of the place has by then been constructed primarily from experiential and organic data. Lacking those prior to visit, secondary sources of information will logically have a much higher impact. Beerli and Martín (2004a: p. 678) fortunately acknowledge this limitation in their research, when, at the end of their paper, they state that their study "made it impossible to measure the pre-visit image of the destination, which would have made it feasible to measure the extent to which secondary information sources influence the formation of the pre-visit image and the way in which primary information sources could alter this image". Such primary sources of information will be discussed in more detail in section 2.5 starting page 65, but already here, it might be opportune to state that it is the particular intention of this research study to measure the influence of induced agents prior to visit. This is something that has not been done before in destination image research.

Information and Communication Technology Enabled Projections

Information Technology has been the key enabler of business process reengineering (BPR), creating the radical changes (Hammer 1990), that have taken place in many industries, including tourism. Hammer prescribes the use of ICT to challenge the

assumptions inherent in the work processes that have existed since long before the advent of modern computer and communication technology. Although this has visibly happened in tourism sectors such as aviation (Sheldon 1997), other sectors have been condemned to reengineering because of market forces. Innovative players from outside the industry seized the moment when realising that the Internet would hold many promises for this information intensive industry (Werthner & Klein 1999: p. 8), where product trial can only be virtual.

"Technology captures and transmits meanings in audio-visual format (voice mail, phone) and textual and graphical expressions (emails, documents). Information or representation space glues people together wherever they are. It provides a real-time and asynchronous layer that connects people through electronic media" (Go & Fenema 2003). This information space captures, represents and transmits (parts of) the identity of places and their tourism product offering. This is referred to in Figure 2-1 as the projected destination image. The media and ICT are essential enablers in this respect. As media and ICT converge (Werthner & Klein 1999: p. 69), future opportunities become even better. People's perceptions of places, without prior visits, will be co-created in their connection with others or based on what they've seen on television, in virtual representations online, read in magazines, brochures, travel guides, seen in museums, through the arts, read in literature or experienced in the movies. Again, also the projected destination image as influenced by tourism actors at the destination, should be anchored to some extent on a true destination identity (Go et al. 2004; Onians 1998; Van Rekom & Go 2003).

However, one could argue that with globalisation, through the information technology facilitated global flows of information, images, voice and data, national identities are torn down and result in "the hollowing out of meaning in everyday life" (Featherstone & Lash 1995: p. 2).

> Others argue instead that a number of positive possibilities can be opened up. They contend that the seemingly empty and universalist signs circulating in the world informational system can be recast into different configurations of meaning. That these transformed social semantics can — in the context of traditional and self-reflexive social practices — instead inform the (re)constitution and/or creation of individual and communal identities (Featherstone & Lash 1995: p. 2-3).

What emerges are imagined communities (Anderson 1991). "These are like traditional and concrete *Gemeinschaften* that people are willing to die for them [sic]. However, unlike 'immediate communities' which were rendered in qualitative time, full space and immediate forms of socialisation, imagined communities are 'imagined' in the sense of their very abstraction — of abstract time, space and the social" (Featherstone & Lash 1995: p. 7). Also called virtual communities, these can now be the post-modern "'*bestowers* of identity' through the invention of tradition" (Featherstone & Lash 1995: p. 12) (see also (Magala 2001)).

Taken literally, sites such as lonelyplanet.com, virtualtourist.com or travellerspoint.com, as referred to in chapter 4, could be the places where new tourism destination identities are

created, defying time, which destroys history; space, which destroys reality; and image/information flows, which destroy the social (Featherstone & Lash 1995: p. 7). This is supported by Kitchin's (2003: p. 7) notion of authenticity being about people co-creating things that matter to them". Apart from developing the tourism product, including its branding, based on a destination's identity, another essential part of the tourism development strategy is therefore to formulate a plan for projecting the 'right' image. Whenever possible, this should exploit existing on- or offline media or other sources of produced imagination, such as in arts and literature, popular culture or in modern-day virtual communities (Magala 2001). It is not always clear in this respect if one is observing 'overt' or 'covert' induced agents. The lines between advertising and independent information provision and sharing are increasingly blurred, as consumers get involved in the production and assemblage processes as many-to-many tourists share information with each other (Dellaert 1999). For instance, some communities (virtual or physical) are directly linked to and facilitated by commercial products, such as for instance in the case of Harley-Davidson H.O.C.s (Harley Owners Clubs) (Oliver 1999: p. 39-40). Others are facilitated by intermediaries (Lonely Planet), still others are grassroot, such as Usenet Newsgroups. The importance of covert induced agents and the sometimes astute way in which they are used to influence destination choice behaviour, will be discussed later, but the fact that good place marketing needs much more than just commercial advertising, is getting more and more attention (Anholt 2003; Gnoth 2002; Olins 1999).

However, this section aims to focus particularly on the projected tourism destination image, using marketing and communication as strategic tools for destinations' tourism development. Covert induced agents will be discussed later as they are particularly useful as a means of providing consumers with alternative place interactions, facilitating secondary experiential sources of place image. On top of that, autonomous agents will receive more attention in section 2.4.3. ICTs are of significance in all these environments, but particularly need to be emphasised as strategic tools for DMOs and the way they project image as well.

Tourism products are experiential in nature, and share the characteristics of other services, in the way that production and consumption take place simultaneously when tourists consume the product. Therefore tourists participate actively in the service operation and create meaning to the experience. It implies that consumers are also actively engaged in the process of creating and attaching meaning to the tourism destination's image (Padgett & Allen 1997). Therefore, one could assume that the interactive nature of the Internet, adds whole new dimensions to destination marketing. Indeed Cho and Fesenmaier (2000: p. 314) point out that: "it is hard for tourists to form a clear destination image without direct experiences". But with the internet tourists gain access to interactive multimedia easily enabling them to enter virtual environments and immerse in virtual experiences. These enable the tourist to form a more vivid and clear destination image.

Cho and Fesenmaier developed a conceptual framework for evaluating the effects of virtual tours as a means to improve destination image by creating virtual experiences in information space. However, before one can evaluate the marketing effectiveness of such virtual tours, it would have to be decided what exactly the image is, that the DMO would like to project, on what identity this should be based and to what extent all those involved

in the creation of identity participate in the formulation of such image (including local, regional, national, multinational, public, private, grass-roots as well as organised groups of local residents and tourists and other organisations). In other words: What does the destination have to offer? What tourists' needs are being satisfied? And, as a result of such investigation, what is the story that the DMO wants to narrate in order to create meaning of place and positively influence its perceived image? Hence the need to revisit the concept of destination image, in particular the way it is projected by destinations.

Created Meaning

In the abstract of their paper on deconstructing destination image construction, Fesenmaier and MacKay provide us with an account of projected destination image and created meaning. "…The actuality of tourism has been suggested as less important than its expressive representations. What is depicted or not depicted in destination image advertising, and on whose authority it is selected, involves a more complex question of what comprises the destination and who has the power to define its identity" (Fesenmaier & MacKay 1996: p. 37). So created meaning defines place identity and projects it accordingly, using narratives and visuals. In general terms we should raise the question as to how tourism destination managers would delineate these narratives. When tourism destinations are defined at the level of countries, some help in answering this question is provided by Hall (1996). He phrases the question as follows. "But how is the modern nation imagined? What representational strategies are deployed to construct our common-sense views of national belonging or identity? …How is the narrative of the national culture told? Of the many aspects, which a comprehensive answer to that question would include", Hall selected five main elements: first, there is the narrative of the nation, as it is told and retold in national histories, literatures, the media, and popular culture; secondly, there is the emphasis on origins, continuity, tradition, and timelessness; a third discursive strategy is the invention of tradition; a fourth example is that of the foundational myth (also elaborated upon by McLean & Cook (2003: p. 155)); and lastly the national identity is also often symbolically grounded on the idea of a pure, original people or "folk" (Hall 1996: p. 613).

Anderson (1991) refers to nations as being "imagined communities". The nation is "*imagined* [emphasis in original] because the members of even the smallest nation will never know most of their fellow-members, meet them, or even hear of them, yet in the minds of each lives the image of the communion" (Anderson 1991: p. 6). Secondly, it "is imagined as a *community* [emphasis in original], because, regardless of the actual inequality and exploitation that may prevail in each, the nation is always conceived as a deep, horizontal comradeship" (Anderson 1991: p. 7). Also Anderson's "point of departure is that nationality, or, as one might prefer to put it in view of the world's multiple significations, nation-ness, as well as nationalism, are cultural artefacts of a particular kind" (Anderson 1991: p. 4). "Nationalism has to be understood by aligning it… with the large cultural systems that preceded it, out of which – as well as against which – it came into being". These are the "*religious community* and the *dynastic realm* [emphasis in original]. For both of these, in their heydays, were taken-for-granted frames of reference, very much as nationality is today" (Anderson 1991: p. 12). Religious communities "were imaginable largely through the medium of a sacred language and written script" (Anderson

1991: p. 12) For instance in Islam, believers from the most far away countries, when they met in Mecca, were able to communicate, because the sacred texts they shared existed only in classical Arabic. "In this sense, written Arabic functioned like Chinese characters to create community out of signs, not sounds" (Anderson 1991: p. 13).

Of course, Latin was the sacred language of Christendom, but it waned steadily after the late Middle Ages, for two reasons: the explorations of the non-European world and the gradual demotion of the sacred language itself (Anderson 1991: p. 16-18). As far as the dynastic realm is concerned: "during the seventeenth century,…the automatic legitimacy of sacral monarchy began its slow decline in Western Europe" (Anderson 1991: p. 21). Gradually, in its place came 'the nation', which was primarily facilitated by "print-capitalism, which made it possible for rapidly growing numbers of people to think about themselves, and to relate themselves to others, in profoundly new ways" in a new age of mechanical reproduction (Anderson 1991: p. 36). "If manuscript knowledge was scarce and arcane lore, print knowledge lived by reproducibility and dissemination" (Anderson 1991: p. 37). Hence, to understand what came to represent national culture "one has to look at the ways in which administrative organisations create meaning" (Anderson 1991: p. 53). These are signs and symbols, with language at the base.

Anderson's significations largely correlate with those of Hall; such as the narrative of the nation. "In an age in which history itself was still widely conceived in terms of 'great events' and 'great leaders' [late 19th, early 20th century], pearls strung along a thread of narrative, it was obviously tempting to decipher the community's past in antique dynasties" (Anderson 1991: p. 109). According to Anderson, traditional people or 'folk' began to be identified through the colonial census, which started during the second half of the nineteenth century. For the emphasis on origins, continuity, tradition, and timelessness, according to Anderson, the "primordialness of language" is again of major importance. "No one can give the date of birth of any language" (Anderson 1991: p. 144). But "it is always a mistake to treat languages in the way that certain nationalist ideologues treat them – as *emblems* [emphasis in original] of nation-ness, like flags, costumes, folk-dances, and the rest. Much the most important thing about language is its capacity for generating imagined communities, building in effect *particular solidarities* [emphasis in original]" (Anderson 1991: p. 133). "Through that language, encountered on mother's knee and parted with only at the grave, pasts are restored, fellowships are imagined, and futures dreamed" (Anderson 1991: p. 154). Furthermore, one could argue that according to Anderson the foundational myth was laid down in the "historical map, designed to demonstrate, in the new cartographic discourse, the antiquity of specific, tightly bounded territorial units" (Anderson 1991: p. 174-175), ultimately, being immortalised in the map-as-logo. Lastly, the invention of tradition is often formalised through the creation of the museum and the education system by the state. All this, eventually, is what constitutes identity (Anderson 1991: p. 204-205).

Competing in the tourism market forces tourist destinations to decide whether and which elements of national, local and regional culture would contribute best to the attraction system of the destination. And next, which elements of the attraction system would most appropriately represent place through the projected images of the destination in question. But again, according to Fesenmaier and MacKay: "The images presented in advertisements

and brochures are, by definition, out of context and recontextualised to suggest an interpretation. The authoritative voices of the display and destination promotion provide this interpretation and authentication since objects have no voice. However, the authoritative voice cannot singularly represent a destination image. The viewers of the image are also involved in conceiving meaning" (Fesenmaier & MacKay 1996: p. 37).

Also Ateljevic and Doorne (2002: p. 648) "reveal imagery as a political process that encodes and reinforces the dominant ideology of tourism culture, essentially a global process which manifests locally and explicitly involves the construction of place". The way this meaning is conceived by the viewers of the image, will be discussed at length in the next section 2.4 starting page 54. However, in chapter 3 this dissertation will study to what extent these identities and images are reflected in the online narratives and pictures that are used to market the fast growing tourism destination of Dubai. The findings will confirm some of the points made here.

For a brief return to structure, of all projected images we distinguish three groups. Firstly, above we have identified the overt induced agents, most importantly marketing and promotion. We focused on the fact that destinations need to identify the elements of identity which they want to use to create meaning through projected images. An example, as will be illustrated in chapter 3, is the advertising on CNN by Dubai International Airport including its Cultural Voyage vignettes. Another group of projected images involves vicarious experiences, which include covert induced agents. These consist of images as projected by intermediaries and produced imagination through the arts, literature and popular culture (Cohen-Hattab & Kerber 2004). The impact of motion pictures has recently received increased attention here (see (Kim & Richardson 2003) and the Inaugural International Tourism and Media Conference held on November 24-26, 2004 in Melbourne, Australia). Vicarious place experiences will be discussed in more detail in section 2.5.3 on page 68, as part of the tourism delivery and supply gap. The reason for this structuring is that vicarious experiences are not in first instance under the control of the tourism destination and therefore not primarily related to the tourism development strategy, at least not a-priori. Thirdly, we distinguish autonomous agents, which are a result of temporal environmental and situational influences. Of particular influence here is news reporting, as will be illustrated in section 2.4.3 on page 61. In all the above cases, the media plays an important role, but in different capacities, either paid for, as in overt induced agents, or as an autonomous news reporting organisations. A grey area is created by the covert induced agents where the destination is not in control, but able to influence the impact of the media on the projected image. It is particularly important to identify the level of influence that these various types of projected images have on the dynamics in the destination image formation model. Also, their particular impact, in first instance, generally relates to different gaps in the model. Therefore it seemed sensible to discuss these different types of projected images in different sections, even though they are closely related.

2.3.3 Tourism Product Offering based on Identity

The tourist's experience of place is often mediated, 'staged' by actors in the tourism industry (MacCannell 1973). Tour packages, the hotel's beautified beach, the guided tour

of museums and monuments, fake airport souvenir art, tourist coaches, even the taxi driver who received introductory and advanced training on 'how to deal with tourists'.

Besides attractions, any general textbook on tourism (Cooper et al. 2000) or tourism management (Page 2003) will list the components that build the tourism product. These are commonly referred to as the 4 A's: Attractions; Amenities (or hospitality industry (i.e. accommodation and F&B/Catering services) and retailing); Access (or transport); and Ancillary Services (or visitor centres, insurance and financial services). For clarification, in Figure 2-1: The 3-gap Tourism Destination Image Formation Model, travel trade partners (tour operators and travel agents) are not part of the product offering itself. They are rather actors in the distribution and communication process (as covert induced agents) and therefore instrumental to projecting the tourism destination image as defined by the DMO and other actors in the tourism industry at the local level.

But the role of DMOs has shifted in recent years from pure marketing organisations to public-private bodies that are also involved in product (attraction) development and industry relations. This provides the opportunity for DMOs to not just project the identity of place, but also to physically change it and enhance the tourism product offering. "This role extension enables a matching of authoritative voice and reconstructed reality in order to verify official imaging"(Fesenmaier & MacKay 1996: p. 38).

A major issue in building and projecting a consistent and coherent tourism product offering however, is the fragmented nature of the industry. Almost 95% of tourism enterprises are small enterprises with less than 10 employees (Rohn 1999: p. 7). In Flanders (the Northern Dutch-speaking part of Belgium) alone, there are 2,764 accommodation providers (Steunpunt Toerisme & Recreatie 2003) and close to 300 registered tourist attractions with at least 5000 visitors a year (Steunpunt Toerisme & Recreatie 2004). To build a coherent product offering with consistent service standards and marketing communications in such a fragmented business environment is a major challenge. But, more though, than just an assemblage of sub-products, tourism is above all a hedonic product, in which various services are offered by a myriad of industries and supporting industries, which within loosely-coupled networks create the conditions that enables visitors to experience places. The experiential nature of tourism is discussed in more detail in section 2.5.1 (page 66). At present, we need to focus on some of the characteristics of tourism services that represent potential barriers to building a coherent product offering and providing a consistent experience of place based on a 'true' place identity.

In general terms, the characteristics that distinguish services from goods are: intangibility, inseparability, variability, and perishability (Hoffman & Bateson 2002: p. 27; Kotler et al. 2003: p. 42; Lovelock & Wright 2002: p. 10; Weaver & Lawton 2002: p. 206). First of all, intangibility, which also lies at the hart of the other unique differences between goods and services (Hoffman & Bateson 2002: p. 27), implies that tourism services cannot be tested or sampled prior to purchase. This is one of the reasons why ICT provides such tremendous novel opportunities for promoting tourism destinations through virtual projections (Cho & Fesenmaier 2000). The use of tangible clues is particularly important, for instance through the use of photography, but also artefacts, architecture and physical

presence in source markets (for instance the design of the foreign destination marketing offices or booths at travel exhibitions).

Second, in services, production and consumption often take place simultaneously, which is referred to as inseparability. If one wants to experience a tourist attraction, for instance a zoo, one will have to go there and enjoy the experience while it is produced (i.e. while the animals and their keepers are going about their normal daily routines of cleaning, feeding, sleeping & breeding, the latter two presumably referring only to the animals). As long as Internet, multi media and virtual reality provide substitute products which are far from experiencing the 'real thing', these types of attractions cannot be copied, stored and shipped to one's home address. That means that passenger transport automatically becomes an integral part of the tourism product, as will hospitality services whenever an overnight stay is needed. This is what adds to the complexity of the tourism product. What is more important though is the social aspect of services. Inseparability causes the consumer to be part of the production process. Hence, the social encounter between the customer and service personnel as well as other customers becomes an integral part of the service experience. As a result different types of customers generate different place interactions. From a tourism marketing perspective, it is therefore vital to have a detailed understanding of these dynamic processes in order to maximise customer experiences. "But the concern which is of utmost importance is the service encounter" (Go & Haywood 2003: p. 97)

A third aspect that causes services to be different from goods is variability or heterogeneity. For service organisations it is very hard to control service quality. Tourism services take place real time, and the customer is involved in the process. Therefore, not only does the level of service differ from one organisation to the next; from one employee within an organisation to the other; from one customer to another; but also from one day to the next. To deal with this heterogeneity, two strategies are often proposed: either standardisation at reduced price or customisation at a premium price (Hoffman & Bateson 2002: p. 40). However, as has been argued in section 2.2, this appears to be an outdated proposition. Today, co-opting the customer through the flexible use of technology in personalised service encounters (Mittal & Lassar 1996) seems to be the only way forward. Indeed Bitner et al. (2000: p. 141-142) propose that technology infusion in the service encounter should facilitate "customisation and flexibility, effective service recovery and spontaneous delight", taking account of the importance of the interaction between customers and employees.

Lastly, a major issue with services is their extreme perishability. Services cannot be stored or unused capacity put on reserve. Without the benefit of carrying an inventory, for a tourism manager, one of the greatest challenges in marketing is to compensate for perishability by effectively matching demand with supply (Hoffman & Bateson 2002: p. 42; Weaver & Lawton 2002: p. 208). There are various strategies that can be deployed in an effort to try to adjust supply and demand in order to achieve a balance. These strategies are listed in Table 2-4.

These measures, both those on the demand strategy as well as the supply strategy side, can have their own, sometimes positive, but often negative, effects on destination image

formation. It follows that within a field involving a myriad of service providers, each representing their own interest and attempting to maximise their own yield, as opposed to the interests and long term competitiveness and economic sustainability of the destination as a whole, decision-making is a daunting task. Therefore, to build a coherent and consistent tourism experience based on place identity is a tremendous challenge, and coordinating and orchestrating the maintenance of a positive destination image even more so. As a result of this discussion, it is expected that the part of this research in which the projected image is evaluated, will generate a mixture of results, where different players are not aligned in their communication. This is discussed in chapter 3.

Table 2-4: Possible solutions to perishability problems

Demand strategies:	**Supply Strategies:**
Creative pricing	Utilisation of part-time employees
Reservation systems	Capacity sharing
Development of complementary services	Advance preparation for expansion
Development of non-peak demand	Utilisation of third party services
	Increase in customer participation

Note: Based on: *Essentials of Services Marketing,* by Hoffman, K.D & J.E.G. Bateson, (2002), second edition, Orlando, Florida: Harcourt, pp. 43-48.

But here already, several issues emerge. If technology infusion in service operations as well as the virtual promotion of destination identity is the way forward: how will it facilitate the projection of place identity. The paradox is that the solution lies in the personalisation of the service encounter, the social interaction between host and guest. Hoffman and Novak (1996: p. 53) and Shih (1998: p. 658) discuss the crucial aspect of 'telepresence' in virtual service encounters (i.e. "the extent to which consumers feel their existence in the virtual space"). If telepresence really occurs, which seems to become ever more lifelike with the advance of technology, the issue of social presence, reflection of identity and trust will become even more important. The danger lies in DMOs and the industry approaching the technology purely from rationalised perspectives, such as those based on the transaction cost reduction arguments provided by Van der Heijden (1995). From a marketing perspective, the internet is all too often used purely as a distribution channel, with suppliers providing listings of functional attributes and facilities and bookable options (Gretzel & Fesenmaier 2003). Also, the technology infusion in service operations is generally grounded in cost-reduction and efficiency claims, instead of focusing on enriching customer experiences. What also should be accounted for, are the affective elements of customer experience and perception. In addition to rationalisation, the technology could be used to facilitate the social encounter and to incorporate identity.

The question that destinations (DMOs and local industry) should ask themselves is: how do we reflect our cultural narrative, traditions, artefacts, language and 'who we are', and how do we invite (co-opt) the customer to appreciate that identity together with us? As mentioned above, physical evidence, through architecture and design, photography and artefacts, is of crucial importance. This applies to the physical environment, incorporating references to local identity, but as Huang (2001) argues, this can be linked to an online environment as well. Also, not just collecting information about consumer preferences and buying behaviour, which indeed allows for better customisation, but also a true

involvement of the customer in the service delivery process, is an area that requires attention and will provide novel opportunities for innovation. Facilitating a more intense social interaction with service delivery personnel and other customers, while the operations are facilitated through technology, would enhance customers' feelings of 'being connected'. Even in an online environment this can be achieved, as can be seen on for instance Amazon.com or many of the virtual travel communities.

It is of interest to note the reinforcing circle that emerges here. We argue that sustainable tourism can only be achieved if place projections and tourism product offerings are embedded in locality, even when incorporated in the global flows of information, images, technology and organisations. This promotes uniqueness and builds competitive advantage. At the same time, through tourism, place experiences embedded in locality facilitate cultural understanding between people in their physical social encounters, which again in itself facilitates an appreciation and promotion of local identities, and so on. If this does not happen, it is quite likely that a development strategy gap occurs.

2.3.4 The Tourism Development Strategy Gap

If the tourism product and the way it is communicated fails to be in line with the destination's true identity, it can create a tourism development strategy gap. The gap occurs as the fundamental prerequisites for a rewarding host-guest encounter are not present when the images generated within the tourism product offering and the way they are projected come to constitute a self-perpetuating system of illusions, which may appear as quaint to the local inhabitants as they do to the tourists themselves. Both hosts as well as guests will become alienated. Britton (1979: p. 318) formulates this as follows:

> The disparity between advertised image and reality has long been of interest to geographers concerned with settlers to or travellers in a new land. The new persistence of distortion is clearly manifest in the surprise and dismay that international tourists frequently experience when travelling in developing countries. The tourism industry continues to portray these places as "paradise," "unspoiled," "sensuous," or other distortions, presumably to compensate for the obvious poverty beyond the hotel or sightseeing bus.… [and] the inability of the tourism industry to represent destinations as real places. Themes and biases in advertisements, travel journalism, and the travel trade press... [and] the use of [other] distorted imagery has adverse impact on the quality of the visitor's experience and on the receiving society.

This is particularly true at destinations with culturally diverse hosts and guests (often in developing countries as suggested by Britton). The tourism product and communication strategy might be formulated in ways so as to attract and satisfy visitors based on their values and preferences, ignoring those of the host. However, the local population has to be employed in the industry and deal with visitor encounters on a daily basis. Then, in situations where the local cultural values have not been communicated and the tourism product offering does not incorporate any reference to these local values, tourist satisfaction will be negatively affected because of unexpected tensions between host and guest. In such a case neither the tourist nor the host community are to blame, but the

tourism develop strategy, because it had failed to raise the right expectations and construct appropriate perceived images in source markets. This is the topic of the next section.

2.4 Tourist Demands Specifications

The formation of image has been described by Reynolds (1965: p. 69), as one of the first commentators, as the development of a mental construct based upon a few impressions chosen from a flood of information. In the case of destination image, this 'flood of information' has many sources including promotional sources (advertising and brochures), the opinions of others (family/friends, travel agents), media reporting (newspapers, magazines, television news reporting and documentaries) and popular culture (motion pictures, literature). "Furthermore, by actually visiting the destination, the image will be affected and modified based upon first hand information and experience" (Echtner & Ritchie 2003: p. 38).

As Reynolds (1965: p. 70) states: "often, of course, the word 'image' is used as equivalent to reputation . . ., what people believe about a person or an institution, *versus* character, what the person or institution actually is". The latter could also be referred to as identity, as discussed in the last section above. Now we will focus on the image as the mental construct of the tourist. The following sections will expand on what Ryan (2000: p. 121) states the tourist to be, that is: "a voyeur whose very presence is a catalyst for action in both the meta and narrow narrative; an interpreter of experience within personal constructs of meaning, but able to discard those meanings in ludic moments…Within this framework of analysis the tourist place becomes a locus of selected meanings". However, a challenge for hosts that attract culturally different groups of visitors is to exploit those few impressions in order to mould perceptions and thereby raising the right expectations. The further away and the more culturally different the visitor, the harder the task of influencing the perceived destination image will be. As explained by Mc Cabe and Stokoe (2004: p. 604): "The changing nature and character of places, together with adapting modes of leisure consumption and commercialization of locales, have shifted the ways in which meanings are attached to places". The way in which consumers do this, is the topic of the following section.

2.4.1 Perceived Tourism Destination Image

With regard to experiential products like travel and tourism, consumers are involved in an ongoing search for information (Leemans 1994: p. 23). By collecting all this information, the consumer creates an image or 'mental prototype'(Tapachai & Waryszak 2000: p. 37) of what the travel experience might look like. As tourism services are intangible, images become more important than reality (Gallarza et al. 2002: p. 57) and the tourism destination images projected in information space will be of great influence on the destination images as perceived by consumers. The latter are generally accepted (Echtner & Ritchie 1993: p. 4; Padgett & Allen 1997: p. 50; Tapachai & Waryszak 2000: p. 38) to be based on attributes, functional consequences, (or expected benefits) and the symbolic meanings or psychological characteristics consumers associate with a specific destination (or service). As a consequence projected images influence destination positioning and ultimately the tourist's buying behaviour.

There seems to be a consensus among authors that the destination image research stream has emerged from Hunt's work of 1971 (Gallarza et al. 2002: p. 58; Hunt 1975). "From this time onwards, there have been numerous and varied approaches to its study", totalling 65 works, between 1971 and 1999, as identified by the thorough synoptic work of Gallarza et al. (2002) as well as Pike (2002) who reviewed 142 papers. One influential study was published by Echtner and Ritchie (1993; 2003). Through their research Echtner and Ritchie concluded that:

- Destination image should be envisioned as having two main components: those that are attribute based and those that are holistic;
- Each of these components contains functional (or more tangible) and psychological (or more abstract) characteristics;
- Images of destinations can also range from those based on "common" functional and psychological traits to those based on more distinctive or even unique features, events, feelings or auras.

This illustrates that there are many aspects involved in formulating the total destination image in the mind of the tourist. . The three-dimensional model envisaged by Echtner and Ritchie is depicted in Figure 2-2, together with some examples for four of the six components. The common versus unique-dimension is missing in this example for Nepal, but normally identifies if image aspects are unique for the specific destination, or shared by others as well.

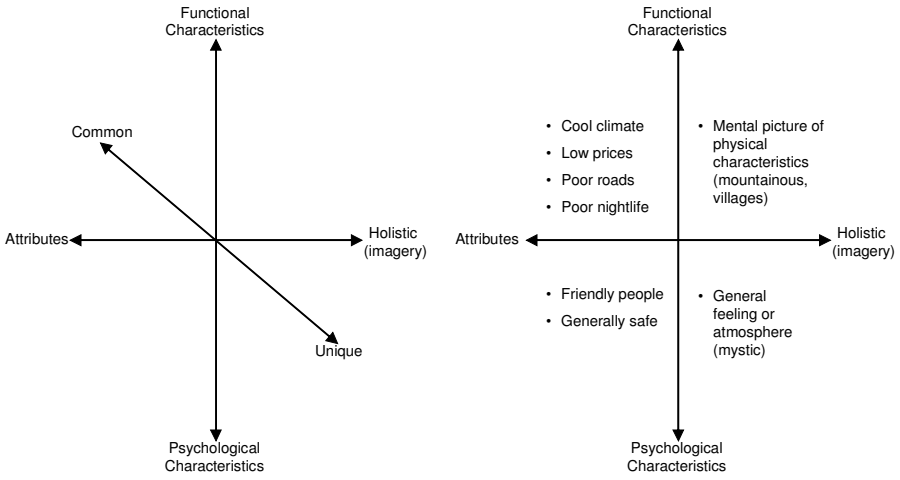


Figure 2-2: Components of destination image and an example of four of those (Nepal)
Note: Reproduced from "The Meaning and Measurement of Destination Image", Echtner, C.M. & Ritchie, J.R.B., 2003, *Journal of Tourism Studies*, 14 (1), 37-48, Reprinted with permission.

Table 2-5: A taxonomy of procedures for measuring tourism destination image

Statistical procedure				Data collection		Authors
I. MULTIVARIATE METHODS	Information reduction procedures	FACTOR ANALYSIS METHODS	Principal Components Analysis	Lk	5	Ahmed (1991; 1996) Baloglu (1997)
				Lk	5	Baloglu & McCleary (1999)
				Lk	7	Walmsley & Young (1998) Sternquist (1985)
				Lk	7	Fakeye & Crompton (1991)
				Lk	10	Muller (1995)
				SD	7	Driscoll et al. (1994)
			Factor Analysis	Lk	7	Crompton et al. (1992) Schroeder (1996)
				Lk	7	Opperman (1996a, 1996b) Guthrie & Gale (1991)
				SD	5	Crompton (1979)
				Lk	6	Echtner & Ritchie (1993)
			Correspondences Analysis	Yes/No		Calantone et al. (1989)
				Yes/No		Eizaguirre & Laka (1996)
			Multidimensional Scaling	Lk	5	Gartner (1989)
				Lk	7	Goodrich (1982)
				2nd technique		Guthrie & Gale (1991)
				Rk	12	Haahti (1986)
				SD	7	Baloglu & Brinberg (1997)
	Grouping		Cluster analysis	2nd technique		Muller (1995)
				DS	5	Embacher & Buttle (1989)
	Dependence Analysis		Multiple regression	Lk	7	Dadgostar e Isotalo (1995)
			Log-linear	2nd technique		Eizaguirre & Laka (1996)
			Conjoint Analysis	Rk	4	Carmichael (1992)
			Analysis of Variance (ANOVAS, MANOVAS;...)	Lk	5	Chon (1992)
				Lk5	SD7	Baloglu & McCleary (1999)
				2nd technique		Schroeder (1996) Crompton (1979)
				2nd technique		Gartner & Hunt (1987) Baloglu (1997)
				2nd technique		Fakeye & Crompton (1991 Ahmed (1991;1996)
II. Bivariate methods	Correlations Analysis			2nd technique		Dadgostar e Isotalo (1995)
	T-Test and others			Lk	7	Chon (1991)
				SD	5	Gartner & Hunt (1987)
				Lk	5	Borchgrevink & Knutson (1997)
				2nd technique		Fakeye & Crompton (1991 Driscoll et al. (1994)
				2nd technique		Ahmed (1991) Muller (1995) Reilly (1990)
				2nd technique		Opperman (1996a, 1996b) Schroeder (1996)

Note. Table and listed references from "Destination Image: Towards a Conceptual Framework", by Gallarza, M.G., I. Gil Saura, & H. Calderon Garcia, 2002, *Annals of Tourism Research*, 29 (1), p. 56-78, Reprinted with permission from Elsevier. (SD = Semantic differential; Lk = Likert scale; Categorical Data: Yes/No; Rk = Ranking order. When studies developed successive algorithms of the transformed data, the name of the author(s) appears repeated in two or more sections. In these cases, the data collection method is cited with the first technique and "2nd technique" appears in the data collection column, in the second citation.)

It is apparent that similar to the earlier discussion about the 'true' identity of place (See the section on Identity and of part 2.3.1 page 36), 'the' destination image does not really exist either. Different projections and perceptions are individual or community constructions

and different individuals and communities might have different or fragmented insights. Arguably it would be better to refer to the 'dominant view', which would normally more or less correspond to the destination's identity in line with sociologist Stuart Hall's narrative of the nation. Therefore, when this dissertation refers to 'the' destination image, what is really meant is the 'dominating image' or the tendency of stereotyping a destination.

Nevertheless, for the sake of readability, the dissertation mostly refers to 'the' image, as if it were one single concept, keeping in mind that it is actually an individualised construct, which incorporates many variations and interpretations.

Because of the complexity of the construct of destination image, Echtner and Ritchie (1993) proposed a combination of structured and unstructured methodologies to measure destination image. They proposed open-ended questionnaires to capture holistic components and more distinctive or unique features of the destination image. Secondly, an attribute-based 8-factor scale was produced to measure destination image performance across destinations. Most studies to date just emphasise the second attribute-based approaches to assessing destination image, as is illustrated in Table 2-5. Gallarza et al. (2002: p. 67) conclude that: "for the most part, there is a combination of multivariate and bivariate techniques, with a greater or lesser presence of qualitative techniques in the preliminary steps. Very few studies use qualitative methods as the main technique. Among all collection procedures, the seven-point Likert Scale is the most commonly used".

Such studies must however be limited because they cannot capture the holistic nature and subjective perspective of the individual, nor the destination's unique characteristics of the image (Echtner & Ritchie 2003; Tapachai & Waryszak 2000). As Bigné et al. (2001: p. 611) state: "the sum of the attribute scores is not an adequate measurement of the overall image". The ideas presented by Van Riel (1996) in the corporate image domain, referred to in chapter 1, would support this reasoning as one would at least need to take into account the level of consumer elaboration of the image.

Although Echtner and Ritchie (1993: p. 12) claim that their approach "can be used to compare and contrast images of most, if not all, tourist destinations", one needs to realise that even destinations and their type of use can be classified into many different categories: city trips, cultural or historical tours, wilderness trails, active holiday, business trip, social get together, winter sports, hiking trails, sea/sun/sand beach holidays, etc. (Govers 1995; Van Rekom 1994a). When considering all common and unique image characteristics each category has its own long list of specific attributes attached to it. Morgan (1999) for instance created a rating system for beaches, which included 49 attributes for beaches alone. The categorization of destinations is normally set by the researcher, (with very few studies comparing two or more different types of destinations), but consumers' perceptions of what type of destination is being considered and what the boundaries are, might not at all be so clear (Gallarza et al. 2002: p. 65). Cho and Fesenmaier(2000) aimed their enquiry into small-scale Eco-tourism, astutely as the object for their virtual tour research. The ingredients for such virtual eco-tour would be relatively 'easy' to assess. However, would it also be applicable in a metropolitan context, if for example the Amsterdam or London tourist offices would decide to create a virtual tour to promote their 'product'? Within the metropolitan context the list of potential attributes to be considered would be much more

complex. And to add to the confusion, what if a destination such as Dubai were to be included in such a study? It has developed an impressive metropolitan presence, but attracts many tourists as a beach resort, although it offers cultural attractions and opportunities for escapism into the desert. How would one assess the image to be projected in a virtual tour for a destination like that?

In recent years the call for more pluralistic approaches to understanding tourism destination image formation has become louder (Feighey 2003; Jenkins 1999; MacKay & Couldwell 2004). Some for instance have started to utilise photographs (Dann 1996b; MacKay & Couldwell 2004; MacKay & Fesenmaier 1997; Markwell 1997). In the research on retail store image, the use of scales has been long criticised based on the observation that "people are encouraged to respond to characteristics that do not necessarily comprise the image they have of the store being studied" (Kunkel & Berry 1968: p. 25). "It has been suggested that a more appropriate measurement would be achieved by the use of unstructured instruments, followed by content analysis and coding of responses" (McDougall & Fry 1974: p. 54). In this way "the respondent is free to discuss only that which is relevant to his image of the store" (Kunkel & Berry 1968: p. 25). Related and alternative methods have been deployed in this research study, as will be illustrated in chapters 3 and 4.

2.4.2 Tourist Identity as Self-focus

The interpretation of the many aspects involved in the formulation of destination image in the mind of the tourist will differ largely between destinations and the type of tourists visiting them (attributes differ according to object (type of destination) and subject (consumer) as Gallarza et al. (2002: p. 62) put it). The latter is also referred to in literature as 'self-focus', where the affective evaluations are not a description of the object, but of the relation between the consumer and the object (Leemans 1994). Sirgy and Su (2000) emphasise the importance of 'self congruity' it this context, which "involves a process of matching a tourist's self-concept to a destination visitor image". A study by MacKay and Fesenmaier (2000) provides empirical evidence to support the notion that the manner in which people view images of a destination is mediated by cultural background, for one thing. Cultural background determines peoples values, ideals, norms, beliefs and folk wisdom (Arnould et al. 2003: p. 77). It would seem logical to assume that these will in turn have an impact on people's perceptions of places. The classic work by Hofstede (2001) for instance found important differences in work related values across 40 national cultures.

It is generally accepted in literature that in the mind of the consumer the perceived destination image is formed by two (Baloglu & Brinberg 1997; Baloglu & McCleary 1999; Embacher & Buttle 1989) or three (Dann 1996b; Gartner 1993) "distinctly different but hierarchically interrelated components: cognitive, affective and [according to some] conative" (Gartner 1993: p. 193). These are all processes of awareness according to Csikszentmihalyi (1995a: p. 19), who also identified attention and memory as the other two structural elements of human consciousness. "Cognitive evaluations refer to the beliefs or knowledge about a destination's attributes whereas affective evaluation refers to feelings toward, or attachment to it" (Baloglu & McCleary 1999: p. 870). According to Gartner (1993: p. 196) "the affective component of image is related to the motives one has

for destination selection". The conative component on the other hand "is the action component which builds on the cognitive and affective stages" (Dann 1996b: p. 49).

If self-congruity takes place, perceived destination image would surely also be mediated by socio-demographic characteristics, cultural background, personal identity and psychological consumer characteristics, which is supported by Baloglu and McCleary (1999: p. 870) (See also: Consumer Behavior (Arnould et al. 2003; Blackwell et al. 2000)). Beerli and Martín (2004a: p. 678; 2004b: p. 623) provide evidence for this as they have empirically established that: (1) tourist motivations (as affective psychological characteristics) influence the affective component of image; (2) the experience of vacation travel (as in learning as a psychological characteristic) has a significant relationship with cognitive and affective images, and (3) the socio-demographic and personal characteristics (gender, age, level of education, country of origin and social class) influence the cognitive as well as the affective assessment of image. However, it has to be stated that these conclusions need to be treated with caution, as most hypotheses in Beerli and Martín's study were only partially maintained; a specific model of causality was not constructed and generalization of results was only permitted within the context of the case study of Lanzarote.

Nevertheless, Echtner and Ritchie (1993: p. 9) do not disagree with the idea that measuring the common attributes of destination image is not sufficient as individuals can hold different interpretations of perceived image. They found that answers to open-ended questions were a rich additional source needed to complement scale items, as they provided more descriptive, distinctive and detailed impressions. For example, "when one scale item measures the degree of perceived friendliness, the open-ended questions revealed the differences in the way this friendliness was manifest – in Jamaica as outgoing and fun, whereas in Japan as reserved and formal" (Echtner & Ritchie 1993: p. 9).

Fairweather and Swaffield (2002: p. 294), also support the notion that there is significant variation in the way individuals interpret a uniform destination image. Help in understanding this can be sought in the literature on destination choice processes. Major contributions to this have been made by Crompton (Ankomah et al. 1996; Um & Crompton 1990) and Woodside (Sirakaya & Woodside in press; Woodside & Lysonski 1989). For a detailed overview of existing literature on destination choice modelling see (Sirakaya & Woodside in press). The most commonly used model (one of "the grand models" according to Sirakaya and Woodside (in press: p. 3)) is that which involves five stages: (1) need recognition; (2) information search; (3) alternative evaluation and selection; (4) purchase; and (5) outcomes (or post-purchase behaviour) (Blackwell et al. 2000: Chapter 3). Dellaert (1999) distinguishes 6 phases, including: (1) research, information search; (2) composition, or the mental integration of different travel components; (3) transaction, or purchase; (4) creation, or production; (5) consumption; and (6) evaluation, or post-purchase behaviour. It could be assumed that perceived destination image will change as consumers go through these various processes. At the same time, however, Decrop and Snelders (2004) found that vacation planning is an ongoing process, which entails a lot of adaptability and opportunism, where fantasy and emotions also play an important role. Hence, this departs from traditional rational decision-making models and supports the notion that with regard to experiential products like travel and tourism,

consumers are involved in an ongoing search for information (Leemans 1994: p. 23; Vogt & Fesenmaier 1998: p. 553). As a result, the need recognition, information search, and alternative evaluation and selection processes, might prove to be more dynamic and non-sequential in tourist destination selection, as they are in other non-hedonic product purchase decisions.

Another approach to destination choice modelling involves choice sets, "a central component of the general models of a tourist's vacation destination selection process (Um & Crompton 1990; Woodside & Lysonski 1989)…The concept postulates that there is a funnelling process which involves a relatively large initial set of destinations being reduced to a smaller late set, from which a final destination is selected" (Ankomah et al. 1996: p. 138). The choice set model is depicted in Figure 2-3. The late set (referred to by others as the 'evoked set' (Sirakaya & Woodside in press: p. 10)) includes those places that a traveller considers as probable destinations to visit. This set can be subdivided into an action set, comprising those destinations related to which potential tourists have taken some action like requesting brochures, and an inaction set of places for which the individual took no further action. If a person does not have sufficient information to make an evaluation on a certain destination, it will end up in the inert set. Destinations in individuals' reject sets have been excluded from consideration because they have received a negative evaluation (Ankomah et al. 1996: p. 139).

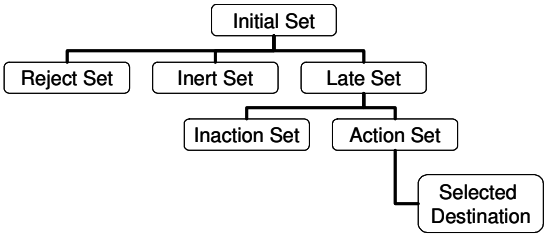


Figure 2-3: Choice Set Model
Note: From "Influence of Cognitive Distance in Vacation Choice", by Ankomah, P.K., J.L. Crompton & D. Baker, (1996), *Annals of Tourism Research*, 23(1), p. 139, Reprinted with permission from Elsevier.

It can be assumed that perceived destination image changes as consumers move destinations from one set to another. This is also supported by Ankomah et al. (1996) who found empirical evidence to support the notion that the accuracy of cognitive distance estimation (as a possible component of perceived image, see Table 4-1) varies among choice sets. However, at the same time it is proposed by Sirakaya and Woodside (in press: p. 14) that "revisions occur to such consideration sets in a dynamic process as consumers move mentally toward making commitment and rejection decisions; [and]… consumers are able to easily report intention probabilities to visit alternatives in consideration sets and these probabilities are revised dynamically". Therefore, linking changes in perceived destination image to altered choice sets will be a challenging task and much of it is likely to depend on situational constraints (Sirakaya & Woodside in press: p. 11). Not much research has been reported in this area, but for one thing, chapter 3 will show that traditional attribute based destination image research seems to be incapable of establishing such relationship between destination choice modelling and image. Therefore, evaluating alternative methodologies for measuring destination image must be a first priority in this dissertation.

As soon as effective standardised methodologies for measuring perceived destination image become available (as illustrated above, much has been written but without agreement), evaluating the relationship between destination choice modelling and perceived destination image will be a vast area of research. This, however, is not the focus of this research, and to avoid measurement issues as to relate perceived destination image change to the progression within the different destination choice stages or formation of choice sets, this study will focus primarily on pre-purchase perceived destination image in general (which in itself constitutes a complete gap in existing literature). Because, as several authors have concluded, the evaluation of the experience at the destination will certainly influence the image and modify it (Bigné et al. 2001; Chon 1991; Echtner & Ritchie 1993; Fakeye & Crompton 1991).

2.4.3 Temporal Environmental or Situational Influences

Temporal environmental or situational influences will also change people's perceptions in the short term (Gartner & Hunt 1987) These are referred to as 'autonomous agents' by Gartner (1993: p. 201-203). Beerli and Martín (2004a: p. 667), based on the work of Gartner, tried to measure the impact on destination image of autonomous agents. They first distinguished: guidebooks, news, articles, reports, documentaries and programs about the destination in the media. Later however, they carelessly combine those into two variables related to 'tourist guidebooks' and 'news and popular culture'. In fact, news and popular culture were coined by Gartner (1993: p. 201) as "two [different] sub-components in the autonomous category". Obviously these components can take many different forms and it would be impossible to try and list them exhaustively, as will be illustrated by the examples that follow. The distinction between autonomous and induced agents might also not always be clear, as destinations can influence the impact of temporal environmental and situational factors through public relations, crisis management and lobbying (Gartner 1993: p. 202). This will be illustrated in section 2.5.3 (page 68) when we examine covert induced agents. The difference is that overt induced agents (as discussed in section 2.3.2 starting page 44) are initiated by the tourism destination (or one or more of its stakeholders) as pro-active interventions, while responses to autonomous agents can only be reactive. Finally, covert induced agents are somewhere in the middle. This can be quite relevant as Gartner (1993: p. 203) states that: "news and popular culture forms of autonomous image formation, because of their high credibility and market penetration, may be the only image formation agents capable of changing an area's image dramatically in a short period of time". One of the reasons for this may be that news does not age well and major events often receive massive attention in a relatively brief period of time. However, without reinforcement, in time, images are likely to revert back to what they were before. This can either be positive of negative, but whatever the case, one would expect that DMOs would want to influence this process. That's why covert induced agents are becoming increasingly important and the nature of many what-used-to-be autonomous agents is changed to become covert induced agents.

Nevertheless Beerli and Martín (2004a) found that, as far as the autonomous sources are concerned, there seemed to be little impact on perceived image. However, again, it needs to be emphasised that Beerli and Martín only measured post-visit image. It is expected that

autonomous agents will have a larger impact in pre-visit image formation, as opposed to post-visit perceptions, which are more likely to be influenced by organic agents as will be shown later. It will be obvious to most researchers that the role of the media, together with other temporal and environmental influences, cannot be ignored within the context of image formation. Particularly with the internet and the current reach of mass media and how people are influenced by these (Magala 2001), major events (significant political, economic, technological or social events) will affect what people observe and read. Subsequently, perceptions will change. "One of the most common Autonomous image formation agents is news reporting. Generally destination area promoters have no control over what appears in a news story and the projected image is based on someone else's interpretation of what is happening in the area" (Gartner 1993: p. 201). Often therefore, destination marketing can be a demanding job.

Recent examples of the tragic impact that major news events and their coverage in the news can have on the tourism industry are obvious. The 2004 Indian Ocean tsunami; the appalling terrorist attacks in various part of the world; and SARS are, of course, examples that stand out. Sometimes it is not even the catastrophe itself that is to blame for deterring visitors, but the way it is blown out of proportion in the press. To illustrate this in case of SARS, tourism professionals were addressing the phenomena with SIP (SARS Induced Panic) to illustrate that not the virus itself, but the subsequent dramatisation in the press was to blame for the rapid decline in international travel to the affected regions.

These situational and transient circumstances could be of great influence on destination image and therefore destination choice behaviour. Many of these can be positive, unexpected and dormant as well though. A good example was in the press in 2002. According to a survey of British tourist boards the 'Queen Mother effect' had boosted the number of visitors to the UK and helped erase memories of the foot and mouth crisis. The Telegraph (e-tid 2002) reported that the results of the survey by MICG, a London-based tourism conference organiser, suggested that the Queen Mother's funeral had more success than official marketing campaigns in encouraging visitors back to Britain. Bookings rose by nearly 20% in Cumbria, one of the areas worst hit by foot and mouth decease, while Cornwall showed a similar increase and many hotels reported occupancy levels close to pre-2001 rates. These examples illustrate how temporal environmental or situational influences can have a dramatic short term effect on perceived destination image. Some of these changes and events though, will, of course, also have a longer term impact on destination image by changing a destination's identity as described in the tourism development strategy section above.

2.4.4 Shared Meaning through Narratives

Destination image is formed in what Go and Fenema (2003) refer to as mind or knowledge space. "We develop and express routines and experiences that are communicated…through stories and scripts…, processed and enhanced by other human beings". People interact and share meaning and subsequently shape each others' perceptions of objects and places. In Gartner's terminology these are called Solicited or Unsolicited Organic Agents (1993: p. 203-204)).This is referred to in Figure 2-1 as word-of-mouth and word-of-mouse (Riedl et al. 2002), the latter being the contemporary reference to people communicating and

willingly or unwillingly collaborating online, such as through the use of e-mail, newsgroups, collaborative filtering, personalised websites, chat rooms or audio/video and pictures (digitalised, accompanied with peoples comments, remarks and critiques or not).

Because of the unique characteristics of services (e.g., intangibility and difficulty of quality control [see section 2.3.3 page 49]), consumer decision-making in tourism is often associated with perceived financial and emotional risks. "In these high-risk situations, word-of-mouth or personal information sources are more influential than impersonal media sources" (Sirakaya & Woodside in press: p. 12). In relation to these organic agents, Beerli and Martín (2004a: p. 677) state that: "the fact that word of mouth is considered to be the most believable and truthful communication channel, together with the fact that it also significantly influences the cognitive image, means that it is important that the messages transmitted in the markets of origin match the reality of the destination". In other words, as we have stated earlier, the projected image must be realistic. If not, DMOs and the local tourism industry will struggle to satisfy tourists who will arrive at their destination with glorified expectations (see also section 2.4.5 page 64). This in turn will have a negative effect on the image that they will transmit by word of mouth on their return home, causing clashes with other induced sources of image formation.

A lot of these processes now also occur online, like in virtual travel communities (Wang & Fesenmaier 2002, 2003, 2004, in press; Wang et al. 2002). Dellaert (1999) argues that with the Internet, consumers get involved in the production and assemblage process, sharing information with others. The possibility of many-to-many communication "could greatly affect marketing communications and branding strategies because it allows individual tourists to influence destination images directly by sharing detailed tourism experience information with others" (Dellaert 1999: p. 66). Therefore, there should be great potential in combining the enabling capabilities of expanded computer processing power and Internet with methodologies of content analysis as applied in the research area of narrative and social psychology. As tourism is clearly an experiential product, as are most services (Dhar & Wertenbroch 2000; Padgett & Allen 1997; Vogt & Fesenmaier 1998), consumers try to organise a complex sequence of events and their reactions to these events (and the information gathered) into a meaningful whole. Understanding this is the province of narrative psychology, which contends that people have the natural propensity to organise information about experiences in story format. It also suggests that people relate their interpretations of experience to others by narrating, or telling stories. Nevertheless (as has been the case in destination image research) the predominant explanation of psychological functioning has focused almost entirely on paradigmatic research, rather than considering the narrative mode. In other words, past research has considered consumers as rational thinkers rather than storytellers (Padgett & Allen 1997). Therefore, for this research study into destination image, given the experiential nature of tourism, this supports the notion that the assumptions of the narrative mode of thought may be more promising than those of the paradigmatic mode of thought, which is not divergent from current thought (McCabe & Stokoe 2004; Padgett & Allen 1997; Tapachai & Waryszak 2000). The narratives that travellers share will therefore be the focus of research when it comes to measuring perceived destination image in chapter 4.

2.4.5 Projected vs. Perceived Destination Image and the Tourism Experience

What results, at the end of this section, is a perceived tourism destination image built up from an extensive set of customer expectations, be it functional or psychological, attribute based or holistic, or based on common traits or unique features. The extent to which the actual tourism experience meets or exceeds these expectations will determine the level of tourist satisfaction (Bigné et al. 2001; Chon 1990; Govers & Go 1999). As MacInnes and Price (1987: p. 481) put it: "even if the actual outcome is favourable, it is likely to differ from the imagined outcome. Deviations of the actual outcome from the imagined outcome give rise to surprise". So one reason why tourists may leave the host dissatisfied may be because they are reading from a different script (Bateson 2002; Hubbert et al. 1995; Schoemaker 1996). In other words, their expectations might be unrealistic. These deviations are an important cause of consumer dissatisfaction. So one way in which tourists become dissatisfied, is when a tourist demands specifications gap occurs. This takes place when the perceived tourism destination image and the tourists' expectations are unrealistic and therefore clash with the actual identity of the place and its tourism product offering as experienced through consumption. This might occur if an unrealistic or incomplete destination image has been projected or the tourist's interpretation of the destination images is distorted because of temporal environmental or situational influences, interaction with others, or the person's own identity (selective attention and retention). This is illustrated by Fairweather and Swaffield (2002: p. 293) who found that "destination image also sets up criteria for negative evaluation. The promotional image is largely skewed towards a set of favourable experiences. When visitors encounter settings or experiences that differ markedly from their expectations, their evaluations can be very negative". This is more likely to happen with culturally diverse groups of visitors as would be supported by MacKay and Fesenmaier (2000). If the cultural setting of a destination is completely different from that of the visitor's home country, the tourism experience is more likely to hold surprises if the promotional image is skewed, than in the case of a destination where the culture is similar.

In another paper, Fesenmaier and MacKay (1996: p. 37) argue that a distorted image can also have a negative effect on the destination's residents. "For residents, an image based on a false reality generates and perpetuates a lie with which the residents must live; thereby, robbing a culture of its authenticity". This in itself will again have a negative effect on tourist satisfaction as tourism delivery and supply deteriorate. In other words, this illustrated that tourists might also become dissatisfied because the actual tourism experience might not correspond to what was rightfully expected because of an inadequate tourism product delivery and supply. Kitchin (2003: p. 17) calls this the "belief gap". This is discussed in more detail in the next section, but only after we have clarified this difference between the tourist demands specifications gap and the tourism delivery and supply gap.

Bigné et al. (2001) discuss in detail the relationship between perceived image and evaluative assessments such as perceived quality and customer satisfaction and their respective influence on post-purchase behaviour, measured by intention to return to and recommend a tourist destination (much of this also based on the work by Oliver (1999) who discusses such issues within a wider marketing theory context). As Bigné et al. (2001:

p. 608) argue, these aspects relate to the "tourists' view rather than the providers'". Hence it fits logically into the bottom part of the destination image formation model, which was under scrutiny in this section that has just been covered (see Figure 2-1). The providers' perspective relates to the tourism development strategy gap; the tourist demands specifications gap determines customer satisfaction; and lastly, the tourism delivery and supply gap determines perceived quality as will be discussed in the next section. This is directly supported by Bigné et al. (Bigné et al. 2001) and Oliver (Oliver 1999) as they explain the difference between quality and satisfaction, the former being more specific, about particular attributes and key aspects of the services delivery, while the latter is based on more holistic judgements base on predictions. In other words, the one focuses on 'image' while the other focuses on perceived experience of actual service delivery. The impact of both of these on behavioural aspects such as repeat visits and willingness to recommend the destination to others, are more conative elements which are outside of the perimeters of this study. From the perceived image perspective, the emphasis in this dissertation lies primarily on assessing destination image pre-visit and on evaluating alternative methods for doing so; both of which are major voids in exiting research. Also, sources of pre-visit image (induced, organic or autonomous agents) and differences according to cultural, social and personal characteristics will be studied. We will return to these in chapter 4. First, however, we need to examine the third and last gap, the tourism delivery and supply gap, in more detail.

2.5 Tourism Delivery and Supply

Section 2.3, the Tourism Development Strategy, focused on place identity and projected image. In section 2.4, Tourist Demands Specifications, we focused on perceived image. In this last section, as the third perspective from which we approach the tourism destination image formation model, in Tourism Delivery and Supply, experience will take centre stage.

Tourism is a service industry which creates experiences with a high dependency on human interaction (see section 2.3.3 on page 49). In particular, the quality of the experience is derived from the interfacing between hosts (front line employees) and guest, the outcome of which can make or break such service encounters. Providing a quality service encounter is an especially daunting challenge for tourism destinations where the guest comes from a different cultural background. Cultural differences are likely to result in miscommunication, which, in turn makes it harder for front-line staff to understand guests' expectations. Of course, repeat interaction of these hosts and guests will alleviate this problem through learning. Therefore, it is expected that familiarity with a certain destination and the level of involvement of the tourist with the destination, will influence the perceived destination image. The information acquired through personal experience or by visiting the destination, forms the primary image, which may differ from the secondary image which was examined in section 2.4. Indeed, some authors, such as Gartner and Hunt (1987) point out that post-visit image tends to be more realistic, complex, and different from the pre-visit images which is based on secondary sources of information. Echtner and Ritchie (1993) believe that the perceived destination image of travellers who are more familiar with a destination is more holistic, psychological, and unique, compared to first-

time visitors who's images are based more on attributes, functional aspects, and common features.

Fakeye and Crompton (1991), however, emphasize the lack of agreement in literature about the impact of the actual experience on the image. Nevertheless, several empirical works in academic literature (Chon 1991; Fakeye & Crompton 1991; Milnam & Pizam 1995) demonstrate that perceived image is influenced by familiarity with, the number of visits to, and the length of stay at a destination. Beerli and Martín (2004a: p. 663) also explain that "one of the factors related to personal experience is the intensity of the visit, or, in other words, the extent of an individual's interaction with the place". This would affect travellers' perceived image as: "the primary source of information formed by personal experience or visits will influence the perceived image depending on the number of visits and their duration, or on the degree of involvement with the place during the stay" [measured by Beerli and Martín by number of different places visited at the destination] (2004a: p. 663). Therefore, standards of delivery and supply of the tourism product as an involved consumer experience must be maintained everywhere, in every location visited by travellers, and at all times.

2.5.1 Tourism Experience as Hedonic Consumption

The tourism experience, facilitated through tourism products and services, is typically an example of hedonic consumption. Leemans (1994: p.210) argues that these "are emotion-laden goods and services for which the consumption experience is an end in itself". He discusses books as a hedonic product, but tourism also qualifies as such, due to its emotion-intensive properties (Vogt & Fesenmaier 1998). Leemans later continues that "factual information on objective and often physical characteristics of single items are much less important than the (holistic, non-attribute based) image that is built around items". Urry (2002) clarifies and extends the argument that tourism experiences have a fundamental visual character, drawing an analogy with Foucault's concept of the gaze. He develops the notion that there are diverse tourist gazes. Others prefer the alternative metaphor of 'performance', or the way Fairweather and Swaffield (2002: p. 294) describe it as "the graded experience of the Elizabethan theatre,…in which some of the audience become active participants, some choose to remain detached spectators, and others move between the two. Furthermore, watching others in the audience perform becomes part of the experience".

Experiences that are "*autotelic*, or rewarding in and of itself", have been termed by Csikszentmihalyi (1995b: p. 8) as states of *flow*. "Artists, athletes, composers, dancers, scientists, and people from all walks of life, when they describe how it feels when they are doing something that is worth doing for its own sake, use terms that are interchangeable in their minutest details. This unanimity suggests that order in consciousness produces a very specific experiential state, so desirable that one wishes to replicate it as often as possible" (Csikszentmihalyi 1995a: p. 29). This is what has been termed 'flow' or… optimal experience. The flow experience is characterised by several dimensions. "When a person's skill is just right to cope with the demands of a situation – and when compared to the entirety of everyday life the demands are above average – the quality of experience

improves noticeably" (Csikszentmihalyi 1995a: p. 32). When the demands are too high, it results in a feeling of anxiety. When the demands are too low, the person might get bored.

Other common characteristics of flow experiences include focused concentration and a distorted sense of time. People in flow commonly have no attention left to think of anything else. Also "hours seem to pass by in minutes, and occasionally a few seconds stretch out into what seems to be an infinity" (Csikszentmihalyi 1995a: p. 33). Although in flow experiences clear goals and quick and unambiguous feedback on performance are needed, the goals are often just an excuse to make the experience possible. "The mountaineer does not climb in order to reach the top of the mountain, but tries to reach the summit in order to climb" (Csikszentmihalyi 1995a: p. 33),

Csikszentmihalyi (1995b: p. 14) argues that "whenever the quality of human experience is at issue, flow becomes relevant", hence its importance for tourism. This is also supported by Cary (2004: p. 68) who argues that "tourist motivation and experiences centre upon the demand for leisure and the subsequent escape from boredom and anxiety. As a sacred journey, tourism foments the optimum conditions for experiencing a heightened state of being; or, for experiencing flow". This illustrates why tourism is such an intricate business. The demands on peoples' skills while travelling, when compared to everyday life, will be above average in most cases. This most likely applies to any sort of tourism, from packaged tours to adventure travel, as demands are assessed relative to the person's everyday life, and different types of tourism experiences probably attract different markets with different domestic backgrounds. As Cary (2004) eludes to in "the tourist moment", many travellers report feelings of harmony with the environment, focused concentration, liminality, losing track of time, and the attractiveness of the act of travelling for its own sake.

At the same time it implies that tourists are often balancing on a thin line between boredom and anxiety. Particularly the latter is often the cause of dissatisfaction. A trip is all too easily ruined if even the smallest thing goes wrong and the demands placed on the tourists exceed their skills. Section 2.3.3 on page 49 illustrated that services are heterogeneous (vary in quality every time a service is delivered) and inseparable (the customer consumes the product while it is being produced). Hence it is not surprising that while the tourist is trying to balance his state of flow, moments of truth in the service encounter often become disruptive. This is particularly true in tourism as a high-contact service sector. Social encounters between tourist and service personnel are decisive. While the tourist's experience is easily tipped to a state of anxiety, the waiter, tour guide or steward is just going about his daily routines, often lacking an understanding of the tourist's state of mind. In virtual service encounters such problems will only be magnified, particularly when host and guest come from different cultural backgrounds, as people prefer remote communications with counterparts that have a similar background, vocabulary and training (Fenema 2002: p. 544). The tourism industry and DMOs need to appreciate these issues in order to deliver the tourism experience according to expectations raised.

2.5.2 A Tourism Product Offering that Delivers the Tourism Experience

Human interactions are essential, as a large part of tourism experiences, including the tourism product delivery as a high customer contact service encounter, refers to interactions with other people, hosts with guests, but also guests with other guests. Part of what is purchased in tourist-related services is a particular social composition of those serving in the front line as well as the social composition of other customers (Urry 2003: p. 17). Tourism experiences take place in what Go and Fenema (2003) refer to as social space. People interact and create meaning in a joint process based on concurrent or similar past experiences. Therefore, interactions in social space do not necessarily have to take place in material space (at the physical destination) but can also take place remotely over the phone or online. Tourism experiences, although still primarily created in material space, are therefore also partly constructed pre and post visit. Interaction with customer service employees while making the booking for instance, or when completing customer feedback surveys, are part of the social interaction and therefore endemic to the experience. It is not surprising that the service management and marketing literature, repeatedly emphasises the importance of frontline employees, also termed "emotional work" or "emotional labour" (Urry 2002: p. 62; Urry 2003: p. 17), particularly for service industries such as hospitality and tourism (Hoffman & Bateson 2002; Kotler et al. 2003; Lovelock 2002; Lovelock & Wright 2002; Zeithalm & Bitner 1996). Personalisation in service encounters has therefore also received increased attention (Mittal & Lassar 1996).

Although the host-guest encounter is essential, relationships with other tourists with whom one shares the same experiences (either family and/or acquaintances in the same travel party, social encounters or friendships established during the visit) influence the tourism experience as well. This takes place during the trip, but is also instrumental to the process of creating multisensory, emotional, historic or fantastic nostalgia prior to and after the visit. Due to the heterogeneity, which characterizes tourism destinations and service performance in general, it is very difficult to set standards of service delivery and supply of the tourism product. However, what we want to emphasise here is that the personal experience of service delivery and the intensity of the host-guest encounter (or lack thereof) is clearly related to the guest' perceived image. The interesting consequence is that offering the tourists easy access and facilitating the co-opting of their competence may unlock the potential of a destination to take the necessary steps to enhancing service quality and influencing perceived destination image in a positive manner. What is often insufficiently appreciated by the industry is that most people, while travelling are out to have fun, meet other people, new cultures and share with others. Through dialog and the performance of genuine, what has been called, 'people-to-people' business, place experiences can be dramatically enhanced.

2.5.3 Experiencing Place in Alternative Ways

A tourism experience cannot be tested or sampled prior to visit, but there are other forms of hedonic consumption that can give a "reality-like" insight into living place identity. Just some examples are: movies, music, TV-shows, exhibitions, events, literature, virtual communities or any other forms of popular culture. The influence of movies on tourism destination image and choice behaviour has received considerable attention in recent years. "Leisure products such as books and movies increasingly trigger consumers to travel to certain destinations (E.g.: Crocodile Dundee - Australia, The Beach - Thailand, Harry

Potter - Great Britain, The Lord of the Rings - New Zealand)" (Klooster et al. 2004: p. Introduction section, ¶ 1). However, DMOs should not make the mistake of thinking that these are autonomous agents that destinations cannot influence or take advantage of.

On July 14 2004, eTurbuNews reported that "movies and television shows help boost tourism" (Alcantara 2004). For instance, as a result of the success of the motion picture "Troy", starring Brad Pitt, the western Turkish city of Çanakkale, the location of ancient Troy, had seen a 73 percent increase in visitor numbers. The number of tourists is expected to increase further when the Trojan horse used in the film is reused as a tourist attraction. Elsewhere, New Zealand is also benefiting from movie exposure. Tourism is said to have increased as a result of its exposure as the backdrop for the movie trilogy "The Lord of the Rings". Over seven percent of tourists visiting New Zealand were influenced by the movie. Hawaii's exposure in television shows ("North Shore", "Hawaii" and "Lost") and movies ("American Idol") have helped boost tourism. In fact, Hawaii had to actively lobby and enter into a competition with other destinations in an effort to try and get producers to film on the island (Alcantara 2004).

Already in 1999, the Economist (Movie Tourism 1999) reported on major tourist attractions in the United States Midwest that were put on the map by Hollywood. Many of these places were relatively unfamiliar until movies had people experience their unique identity in the theatres. Examples are: Winterset, Iowa in "The Bridges of Madison County"; Fort Hays in Kansas in "Dances with Wolves"; and The "Star Trek" Trek Fest in Riverside, Iowa, the claimed future birthplace of Captain Kirk, blessed by the television show's director, Gene Roddenberry;

As mentioned earlier, current developments show that destinations increasingly try to turn what-used-to-be autonomous agents into covert induced agents. These days, even celebrities are often called to the rescue of destinations in crisis, such as in SARS affected areas or destinations that have experienced the devastating effects of wars or terrorism (Alcantara 2003). Also, museums can be useful providers of vicarious place experiences and a means to produce covert induced agents. The parallel between museum exhibitor and destination marketer has been identified by Fesenmaier and MacKay. "The roles of the museum exhibitor and destination marketer are paralleled by their efforts to control portrayal of culture and image. The planned exhibit and the constructed tourist destination image both represent a vision controlled by political ideologies" (Fesenmaier & MacKay 1996: p. 38).

Lastly, as discussed earlier briefly, with current day technology, virtual communities become interesting instruments in providing vicarious experiences. "These communities may serve as extensions of the destination, and become colonies that revive destination-specific events (cultural, environmental etc.)" (Klooster et al. 2004: p. Destination Brand Communities section, ¶ 3). As such, the above off-site destination consumption experiences are obviously interrelated. Relevant movies and books are discussed in destination virtual communities and museum-like exhibitions of 'the-making-of" will influence destination image in their own way. At the same time it is important though to distinguish them from overt induced agents and autonomous agents as discussed in sections 2.3.2 and 2.4.3

2.5.4 Projecting Hedonic Products: Pictures and Text

Although only sporadically investigated empirically in tourism research (Albers & James 1988; Fairweather & Swaffield 2002; MacKay & Fesenmaier 1997; Markwell 1997; Pritchard & Morgan 2001; Sternberg 1997), many have argued in conceptual theoretical papers for the critical analysis of photographs, besides concentrating on textual and literary representations, in areas such as anthropology, sociology, geography and tourism and hospitality research in particular (Cohen 1988; Feighey 2003; Garlick 2002; Human 1999; Ryan 1994, 2003). The relationship between photography and tourism has therefore received some interesting coverage, such as for instance by Fesenmaier and MacKay (1996: p. 40). "Photography represents a key vehicle for manipulating imagery by moulding what and how things are viewed. What potential tourists see as a replication of the real and as a credible source of information, is instead a 'subjectively mediated content and composition'" (Albers & James 1988 as in; Fesenmaier & MacKay 1996: p. 40) Human (1999: p. 80) characterises the relationship as "ambivalent". "Many destinations visited by tourists have a strong identity and sense of place, which is embodied in the history… (culture)…, physical form and social activity. However, photography selectively extracts from this multifaceted expression and reduces it to a series of icons. This distorts the identity and trivialises the place and contributes to the consuming nature of tourism".

As has been argued, tourism can indeed be categorised as a form of hedonic consumption, where the experience is an end in itself (Hirschman & Holbrook 1982; Leemans 1994; Vogt & Fesenmaier 1998). Sternberg (1997: p. 951) in fact "argues that tourism planning has as its central challenge the design of effective touristic experiences, and can find conceptual sources for this task in iconography". Also Garlick (2002: p. 289) "takes up this question of what role photography plays in determining the nature of touristic experience". According to Sontag (2002: p. 3) this is a critical issue as "photographs, in teaching us a new visual code, alter and enlarge our notions of what is worth looking at and what we have a right to observe" and at the same time, "photographs really are experience captured, and the camera is the ideal arm of consciousness in its acquisitive mode". Fesenmaier and MacKay's (1996: p. 41) argument is final: "since tourism is uniquely visual, photographs are considered paramount to successfully creating and communicating an image of a destination".

Hirschman and Holbrook (1982: p. 92) emphasise the importance of multisensory, fantasy and emotive aspects of experiential or hedonic products such as tourism (the "three Fs": fantasies, feelings and fun (Holbrook 2000: p. 178; Holbrook & Hirschman 1982)). Consumers build up emotional arousals and mental multisensory imagery, either historic (i.e. based on prior experiences), or fantasy imagery, based on what they (expect to) taste, hear, smell, see or feel when consuming experiential products. Gretzel and Fesenmaier (2003: p. 51) argue that, in order to improve future tourism marketing strategies, sensory tourism information should be communicated; either through new emerging technologies such as virtual tours (possibly incorporating the development of sensors for taste, smell and touch) or using traditional forms such as metaphors and narratives. In online environments Hoffman and Novak (1996: p. 61) and Shih (1998: p. 655) refer to this as "vividness", which addresses the breadth and depth of sensory information provided.

Vividness, together with the interactivity of the internet, potentially leads to "telepresence" (Hoffman & Novak 1996; Shih 1998), "the extent to which consumers feel their existence in the virtual space" (Shih 1998: p. 658), i.e. the extent to which they are able to experience what is presented through interactive and rich sensory information. According to Hoffman and Novak (1996) this could eventually lead the consumer into a state of flow in itself (without the actual tourism consumption experience needing to happen). It seems hard to imagine more effective ways as to create a strong destination image prior to visit.

Narratives about places are the basis for creating destination image and are enhanced by photographic material. Hirschman and Holbrook (1982: p. 93) also argue that in the hedonic consumption perspective "the researcher is concerned not so much with what the product is as with what it represents. Product Image, not strict reality, is a central focus". As explained earlier, narrative psychology contends that people have the natural propensity to organise information about experiences in story format. It also suggests that people relate their interpretations of experience to others by narrating, or telling stories (Dhar & Wertenbroch 2000; Padgett & Allen 1997; Vogt & Fesenmaier 1998). Ideally therefore, narratives included in marketing material for tourism destinations should represent such rich tourism experiences and reflect multisensory, fantasy and emotional cues. Incorporating photographic material (as well as other visuals and sounds (Hoffman & Novak 1996; Shih 1998)) may contribute significantly to this. "Although frequently conveyed as a stereotype, visuals in destination promotions are salient in early stages of destination evaluation and when the tourist's experience and/or involvement level is low. As such, destination decisions may be based on the symbolic elements of the destination (as conveyed in visual imagery) rather than the actual features" (Fesenmaier & MacKay 1996: p. 37).

This aspect of destination image can be examined through the content analysis of publications about destinations and the beliefs that tourists share with others. For one thing, it can provide destinations better insight into the way in which they incorporate the authentic in relation to the identity of place in the online image projection so as to enhance the experiential nature of tourism. For instance Pritchard and Morgan (Pritchard & Morgan 2001), in their analysis of 27 Welsh local tourism authority brochures, found significant differences in the projected images aimed at the UK market in comparison to those aimed at the US market. The 'Welshness' and amount of reference to local heritage was much more evident in the brochures aimed at the US market, while brochure content for the UK market seemed to focus on generic holiday attributes such as scenery and activities. There seems to be a tension between the desire to project imagery that provides an authentic identity of place, but at the same time commoditises it for tourism consumption, reflecting desirable experiences (or staged authenticity) (Cohen 1988: p. 371; MacCannell 1973).

This dissertation examines, amongst other things, this tension between cultural identity and commodification. In particular, there is a desire within the cultural community and public sector to project imagery that represents an authentic identity of place, whereas commercial interests are keen to stage authenticity (Cohen 1988: p. 371; MacCannell 1973) to represent desirable tourist activities, or convenient commodities for consumption. As a result, we expect our investigation into the use of imagery and narratives by the tourism industry in Dubai, to show differences between public and private institutions and

different sectors of the industry, in terms of the images that they project online and the related perceptions of relevant decision-makers. Also, some stakeholders might not be heard at all, because as was discussed in section 2.3 (p. 34) imagery formation is negotiated, a political process reflecting power structures and ideology (Ateljevic & Doorne 2002; Jeong & Almeida Santos 2004; Morgan & Pritchard 1998; Pritchard & Morgan 2001). "Destination marketing organisations emit an authoritative voice in the visual and verbal context of their advertisements and travel brochures". In so doing, the voices of residents may not be heard (Fesenmaier & MacKay 1996: p. 39).

This will be investigated in the next chapter. Consequently, the dissertation will build on "one of the most important questions" already raised in the early eighties by Boulding (1983): "What do our decision-makers read? That is, what kind of image of the world do they have?" Investigating what is projected by various actors in the industry, would give us insight into what part of the image of the world that they have, they want to "appropriate" (Sontag 2002: p. 4). If, as according to Sontag (2002: p. 3), "the most grandiose result of the photographic enterprise is to give us the sense that we can hold the world in our heads - as an anthology of images" (i.e. "to collect photographs is to collect the world"), the presentation of these collections as assembled by tourism actors would represent their view of the world as they would like us, the public, to see it. As Boulding illustrates: "It may be that a small nuclear catastrophe, for example, in the Middle East, would shock people to the point where there would be a restructuring of the human image and the national image". Boulding must have been anticipating Huntington's Clash of Civilisations (Huntington 1993) using this example, as this dissertation will illustrate the impact recent events in the Middle East have had on the way the tourism industry in Dubai projects its destination image.

Taking this into account, different actors in the tourism industry, public agencies versus private sector-specific companies, are hypothesised to have different objectives in terms of projecting a destination image that will favourably affect their intended positioning and ultimately their customers' buying behaviour. We anticipate that decision-makers within public agencies will utilise imagery and narratives that tend to be focused on authentic cultural identity, while private organisations might in fact try to avoid that, focusing more on commoditised experiences. "The issue is", as Long (1997) puts it, "how actors struggle to give meaning to their experiences through an array of representations, images, cognitive understandings, and emotional responses".

2.5.5 The Tourism Delivery and Supply Gap

In contrast to the consumption of goods which customers acquire for utilitarian benefits, the tourism product is intangible and experiential in nature, involving emotions, feelings, drama and fantasies and aims to satisfy primarily psychological benefits. Traditionally, researchers have viewed its labour intensive character, the dependency on human interaction, and the involvement of a myriad of actors who participate in one way or another in the production, delivery and consumption of a total experience, as central issues. For example, consistency in service is often cited as being problematic, because any interruption in the delivery process will immediately affect service quality due to the simultaneous production and consumption.

Recently, therefore, the role of personalisation in service encounters (Mittal & Lassar 1996) and the management of personalised experiences (Prahalad & Ramaswamy 2000) have received increased attention. Several guidelines are offered for service organisations to allow them to deal with service experience issues. First, destinations need to manage multiple channels of experience, such as vicarious experiences through popular culture, social space experiences as well as the actual travel experience. The key challenge here will be "to ensure that the nature and quality of the fulfilment, the personalised experience of the individual, is not different across the channels" (Prahalad & Ramaswamy 2000: p. 84). Secondly, destinations need to manage variety and evolution in service delivery. Customers "judge a company's products not by their features but by the degree to which a product or service gives them the experiences *they* want" (Prahalad & Ramaswamy 2000: p. 85: emphasis added). Customisation and knowledge about tourist demands specifications and how these change based on past experiences are therefore essential. Lastly, shaping customers expectations and demands specifications is of crucial importance. This "is not just about one-way communication by managers or advertising [of projected image]. It is about engaging current and potential customers in public debate" (Prahalad & Ramaswamy 2000: p. 86).

A limitation of much of the present research is that it seems to perceive tourism organisations and businesses as 'command and control' type organisations, wherein the focus has been on transaction cost theory, as opposed to the development of social interaction skills and trust. The latter are at the roots of the emerging etiquettes of market forces and decision-making teams that are rapidly becoming the building blocks of the network economy. Organisational theory directed at the development of 'command and control' type DMOs should be viewed as a myth in a world where uncertainty seems the only certainty. Specifically, even when the DMO and local tourism businesses possess the 'right' information about the visitor expectations and the perceived destination image in the mind of the visitor is realistic, the delivery of the tourism experience can still be disappointing, affecting service quality, if service personnel are not empowered to deliver a truly personalised yet consistent service that co-opts the customer. Not much is needed to negatively affect customer satisfaction whenever organisations fail to do this (see again for effect of quality on satisfaction Bigné et al. (2001)), particularly in situations where host and guest come from different cultural backgrounds. When the value systems on which host and guest base their social expectations and behaviour are different, it makes it more difficult for front line service employees to anticipate guest expectations and to offer a rapid response accordingly. As a result, the third and final tourism delivery and supply gap appears.

2.6 Conclusion

In this chapter, we have deconstructed the destination image formation model from a theory development perspective. Through a thorough review and integration of existing literature we have examined both the antecedents of the model in philosophy and the immediate discipline of marketing at the interface of ICT, as well as the components that constitute the model itself. Several recurring themes can be identified.

Probably the most important conclusion must be that past research has major limitations as far that it assumes that both on the demand as well as the supply side we are dealing with rational decision-makers. Consumers, organisations and individuals in co-operative networks have been treated as homogeneous groups whose decision-making is based on similar cognitive processes aimed at utility optimisation. A lack of appreciation of the affective and social elements of human conduct in past research, has allowed us to identify important shortcomings, which have had major impacts on the way we have formulated our research. Some of the most important observations that we would like to take away with us to the following chapters will be re-emphasised here.

First of all, we have argued that from a tourism development strategy perspective, DMOs and local tourism industries need to embed their projected images and tourism product offering within local uniqueness and identity. Semi-static and colouring elements of identity are crucial, as they allow for subjective interpretation and hence lead to power struggles and political hijacking. The ongoing discussion in literature about the degree to which the identity of place, the unique resources and capabilities that form the competitive advantage of a destination, are 'authentic', seems to be patronising and irrelevant; at least, as far as our assessment of the level of authenticity, as academics, is concerned. We believe that the only valid assessment of authenticity is to measure the extent to which people co-create things that matter to them. By people, here, of course, we refer to the actors directly involved in the process – consumers, local residents and front-line service personnel - not public agencies and actors aiming to include and exclude people in line with their political objectives, nor local business or multinational management companies and intermediaries concerned primarily with yield maximisation. Of course, we appreciate that this might be a naïve perspective, as economic and political reality cannot be ignored. However, what really matters is that place identities are safeguarded from the perils of commoditisation through foreign intermediaries and the exploitation by local and multinational businesses and political leadership with hidden agendas. Nevertheless, the international community and academia should not take the high road and argue that progress and modernisation "is not for them', except for when it is to our convenience. In that sense tourism has turned into an arena wherein tourism imagery is seen to have filled the void left by colonialism, to exert cultural power and thereby construct peoples and places.

This has been facilitated by the process of globalisation, where the global flows of finance, information technology, images and international labour and management are believed to have led to a process of 'McDonaldisation'. Fortunately, others have identified the opposite reaction, where local groups are in search of identity and secure moorings in a world dominated by ephemerality and extravagant expectations. We believe that culture, heritage and tourism can build on each other, both in order to provide destinations with a sustainable competitive advantage as well as combining it with the development of modern urban functions. Identity can be projected by a focus on local narratives, traditions (either historical or invented), artefacts, local language, and a sense of who the people are – 'the folks' – that populate a place. For airlines and hospitality businesses operated by multinational management companies utilising international labour, organisations that are therefore firmly rooted in the network of global flows, detached from the locales in which they operate, and projecting ephemeral images, this might prove to be a major challenge.

Nevertheless, for the DMO and local authorities, it is important to recognise these issues. At the same time we need to clarify that, of course, these elements of identity do not have to be 'old'; it could easily refer to current traditions, modern society and contemporary art and popular culture, just as well. The point is that whatever is rooted in local identity should, in most cases, establish uniqueness. That hopefully provides for a sustainable flow of tourism arrivals. This breeds cultural understanding and respect for local resources, while it brings in foreign currency as well. Both of these can subsequently be employed to further invest in local resources and the construction of modern functions which help local residents. Hence, it also facilitates social sustainability.

This leads us to a second important observation that needs to be carried forward from this chapter: the need for renewed social interaction. The main benefit of technology is not, as many have argued, its ability to increase efficiency and reduce transaction cost, but rather its application in the facilitation of social exchange, innovation and the management of multiple channels of experiences, such as the increasing importance of vicarious experiences. An important source of potential dissatisfaction in the host-guest encounter, is the way in which service delivery and supply fulfils (or fails to fulfil) expectations. Services in general are problematic because of their intangibility, perishability and heterogeneity. But particularly in tourism, where production and consumption also takes place simultaneously and where customers and service employees often have different cultural backgrounds, this is a major issue. Past management practices and literature have focused on rational solutions to this, such as formalisation of operating procedures, standardisation, and training and education oriented towards the perfecting op basic skills. Now that technology is able to replace or streamline many of the manual operations involved, service delivery has and will become increasingly characterised by detached and clinical processes. This holds particularly true when it involves remote interactions. Hence several authors have argued for a renewed personalisation of the service encounter and a process of co-opting the customer. As we have seen, an important component of perceived image involves affective elements. In many cases these are likely to relate to interpersonal expectations and feelings. As the actual tourism experience also influences perceived image as do vicarious experiences, which will in turn have a major impact on the perceived images of others through word-of-mouth, it is crucial that the tourism industry recognises this need for social interaction en rich tourism experiences.

This also relates to a third important observation we want to put forward, involving the way in which tourism experiences are projected. As opposed to physical goods and services where utilitarian benefits are often important, tourism is primarily a hedonic product, where emotions, fun and fantasy play important roles. In other words, affective elements become more important than rational considerations. It emphasised the importance of multisensory information. The actual physical tourism experience at the destination involves seeing, smelling, feeling and hearing things and thereby building a rich perceptual image of the immersive experience. To project this in virtual environments holds many challenges. Real vividness of projected experiences, facilitating telepresence, is very hard to achieve, and based on our literature review, we need to conclude a-priori that this issue is largely misunderstood by the tourism industry as well as academia. There is a focus on practical rational elements of destination choice behaviour and marketing and particularly in online environments these elements seem to prevail. Booking dates, prices,

climatic conditions, availability, facilities and activities, accessibility, currencies and languages spoken are just some examples of attributes that generally seem to receive most attention.

Fourthly, from a supply perspective, an important observation to make is that again, it seems that there is a void in the body of knowledge when it comes to understanding the human element of destination management and tourism sector co-operation in relation to destination image projection. Irrational processes based on stereotyping and subjective interpretation, lack of trust, myopic views and social prejudice seem to be much more important than literature has appreciated thus far. For instance, we anticipate that public and private sector bodies differ markedly in their objectives and the way they project images of place. However, public and private interests might be more connected than has been appreciated thus far. Such connection is increasingly important due to a growing complexity of decision-making which both public and private interests face, as a result of the interrelation of several strategic challenges, one of which is how to project a tourism destination. In this context, public and private interests tend to have different views of a situation and define problems differently. However, divergence may be interpreted as a productive force, if people through debate and interaction learn from one another.

Also on the demand side, past research measuring perceived image has focused on methodologies that fail to incorporate many of the affective elements of perceived image. Both each destination, as well as each individual consumer, is unique. Focussing on common attributes across destinations, and common measurement scales across different groups of consumer, will inevitable fail to recognise many of the subtle differences, unique characteristics and holistic impressions that determine consumer preferences and destination choice behaviour. By integrating a large variety of sources in literature, we have tried to identify the many elements in the destination image formation model that have a dynamic influence on perceived image. These include: the self-focus of the individual consumer; temporal environmental and situational influence; word-of-mouth; vicarious experiences; and, of course, the actual tourism experience itself. This seems to provide evidence for our assertion that the process of destination image formation is much more subtle and subjective than it appears to be in much of the existing destination measurement literature. Therefore, continuing into chapters 3 and 4, we have decided, both in our research on projected image (supply side), as well as with regards to perceived image (demand side), to use an existentialist constructivist approach, based on content analysis of pictures and text, resulting in an interpretation of subjective meaning. Here again, it is the technology that has facilitated us to do that using innovative research techniques that open up novel opportunities.

Lastly, through the 3-GAP tourism destination image formation model, we have also tried to illustrate that perceived image and the way it is influenced by the personal experience of service delivery and the host-guest encounter, cannot be seriously understood without studying the configuration of power in the tourism context and concepts such as "staged authenticity" (McCannell 1973) and the identity construction of the nation. Therefore, we turn to chapter 3 for a detailed research background description of Dubai and its identity and an empirical analysis of the way in which it projects its image online. Apart from providing empirical support for our theoretical observations it allows us to determine to

what extent the gaps, as formulated in our model, can be identified in a specific research setting.

3 EMPIRICAL ANALYSIS: PROJECTED DESTINATION IMAGE

> *With the ending of the frigid Fifty Years' War between Soviet-style communism and the West's liberal democracy, some observers… announced that we had reached the "end of history". Nothing could be further from the truth. In fact, now that the bitter ideological confrontation sparked by this [last] century 's collision of "isms" has ended, larger numbers of people from more points on the globe than ever before have aggressively come forward to participate in history. They have left behind centuries, even millennia, of obscurity in forest and desert and rural isolation to request from the world community - and from the global economy that links it together - a decent life themselves and a better life for their children* (Ohmae 1995: Introduction).

This chapter will investigate online projected destination image, in terms of pictures and text, as theoretically discussed in chapter 2. The context of reference is Dubai, the fast growing tourism and leisure capital of the Middle East. Throughout the rest of this dissertation, other destinations and examples will receive attention, but always as a comparison to Dubai or as a means for theory testing in order to develop the methodology or interpretation of existing work that might help in understanding the developments taking place in emergent destinations such as Dubai and the way in which one should measure their image. The first part of this chapter will therefore discuss the context of Dubai in depth, after which we will present our empirical study of the projected image of Dubai, for which we have applied a content analysis methodology.

Of interest in chapters 3 and 4 is the extent to which global facts take local form. In this sense, we would encourage the reader not to interpret the following chapters as being about the specific context of Dubai. Rather, it is about a typical example of a rapidly developing region or city-state, riding the waves of globalisation, having firmly established itself, in less than 15 years, as an important node in the network of global flows. It is not the destination Dubai that is of central interest, but the results of the phenomenographic analysis of the way in which this newly established tourism destination is projecting itself and being imagined by international travellers online, and the way in which these results have been obtained. The following research background description provides an assessment of the sense of place and facilitates a comparison of the empirical content analysis and survey results with the actual tourism product offering and local identity. The findings resulting from this analysis are likely to be of interest to many developing destinations in the emerging network of global hubs.

Also, the contribution lies in the innovative research methodology applied and the way in which it establishes the relationships hypothesised in the destination image formation model. Therefore, for many, not so much the content of the findings will be of interest, but rather the way in which these results have been generated. This chapter reports on the

methodology and results regarding the measurement of projected image. Chapter 4 will examine perceived image.

3.1 Methodology

It needs to be emphasised that the research background description that is provided in the first half of this chapter, is not the primary source of empirical data from which we will induce our main conclusions. Our findings are primarily based on the results of content and survey analysis, as applied in the latter half of this chapter and chapter 4. The primary objective of the next section is to provide a frame of reference against which the results of the content analysis of projected image and the survey results with regards to the perceived image can be better understood. Projected and perceived place images are dependent on the subjective experience of the physical aspects of place by those who determine what is projected and by those who perceive the projected image, i.e. visitors, potential visitors and consumers in general. In order to understand the content of these images, we need to be able to contrast them with a more objective frame of reference. In other words, in order to be able to assess to what extent the projected and perceived images are in line with the place identity, we must first provide some basic case description in order to gain some insight into that identity of place. This is all that we intend to achieve in the next section, to provide a link between the rest of chapter 3 and chapter 4. What is presented is a detailed account of the frame of reference within which our research has been conducted, based on secondary data. In fact, whenever we take away major conclusions or observations from this research context description, these are generally based on secondary sources of scientific contributions. Nevertheless, although we are not building theory from this "case study description", we have attempted to apply some of the suggested techniques of case study methodologies, in order to warrant quality of data. The approach is based on the work by Yin (2003) and Eisenhardt (1989), and will be briefly elaborated upon here.

First of all, multiple sources of evidence were used. Documental evidence was found in sources ranging from scientific conference and journal papers and books, to news clippings and information found on the various websites of governmental agencies, investment companies and tourism businesses in Dubai. Data on international arrivals, hotel statistics and visitor surveys was collected from the World Tourism Organisation and the One Stop Information Centre of the Department of Tourism and Commerce Marketing Dubai. Lastly, interviews were held with senior officials at the Department of Tourism and Commerce Marketing, Arabian Adventures (part of Emirates Group), Nakheel Properties, Dubai Festival City and Jumeirah (formerly known as Jumeirah International).

Secondly, we reported on the case study description so that informants and other audiences were able to provide feedback and enhance our findings. Abbreviated versions of this chapter 3 were published in the proceedings and presented at the International Conference on Information Technology and Tourism (ENTER). Another version was published in the journal of Information Technology and Tourism. Copies were sent to senior officials at the Department of Tourism and Commerce Marketing and the Dubai Tourism Development Company. As a case study, the research background description was finally used for teaching purposes at the Erasmus University, as well as the Universities of Leuven and Antwerp and the Emirates Academy of Hospitality Management in Dubai. Through these

communication opportunities we were able to enhance our understanding of the research background within which we were operating. Particularly the different responses we received from students in Dubai contrasted with the feedback from students in the Netherlands and Belgium proved to be valuable.

3.2 Research Background: Destination Dubai

Dubai is one of the seven Emirates comprising the United Arab Emirates (UAE), which is strategically positioned on the North-Eastern tip of the Arabian Peninsula, South of the Arabian Gulf. As a Gulf state, like so many other nations in the Middle East, the UAE has faced many challenges trying to maintain its impressive economic prosperity over the last few years following recent events, which dramatically impacted its geopolitical environment. Particularly the second Gulf War has shown the tremendous impact that the spread of global media has on projecting destination image. Everyone will recall the rivalry between regional and international (read American/European) news broadcasters and their differences in the way in which events were reported. Huntington's (1993) Clash of Civilisations seemed to have turned into reality.

Two Gulf Wars, September 11 and the ongoing destabilisation of the Middle East have probably not improved the Gulf region's image in the West. But Dubai and its leadership have tried to take advantage of this raised level of attention, illustrating to the world the rapid development of the Emirate, the high level of modernisation, but at the same time not shying away from its identity and heritage. In fact, Sheikh Mohammed bin Rashid Al Maktoum, crown prince of Dubai and its most visible leader, actively promotes entrepreneurship, curtailment of bureaucracy and corruption, and modernisation, but with respect for heritage, culture and roots. This is illustrated in the UAE's position during the second Gulf war.

> Sheik Mohammed also serves as defence minister of the UAE. In this capacity, he oversaw the deployment of 4,000 troops to Kuwait this past February [2003]. Though the UAE opposed the war and advocated giving U.N. inspectors more time to find Iraq's famously elusive weapons of mass destruction, the sheik made clear that UAE forces would help protect Kuwait. Exemplifying a rare instance of Arab unity—the emirates act as a single entity in conducting foreign affairs, although each emir remains sovereign within his own principality - the UAE serves as a voice of moderation in the often fractious politics of the region (Ringle 2003: p. 3).

In fact, Dubai is using the focus of attention on the region, the renewed global interest in Islam and Arabic culture, and the attention that Dubai gets as a rapidly modernising global hub in the Middle East, as a means to maintain and publicise its identity and heritage. It raises a key issue, namely how Dubai might be able to maintain its Islamic identity and heritage whilst globalising its economy at the same time? In fact, tourism development in Dubai is not a matter of tourism dollars supporting the rest of the economy at the cost of losing the identity and authenticity of place. Quite the contrary, the oil dollars and income from trade, that are reinvested in a tourism infrastructure in order to diversify the economy, has created the opportunity to preserve the local heritage for the sake of tourism, in a state

that was rapidly globalising anyway. Tourism in Dubai has only recently expanded, rapidly gaining significance over the last five years, as the oil to non-oil ratio of the gross domestic product has decreased from almost 36% in 1990 to less than 10% in 2001 (Government of Dubai - Department of Tourism and Commerce Marketing 2002).

Dubai was the fastest growing tourism destination in the world in 2002, with growth rates of over 32% (growing 10 times faster than the rest of the world). Even in 2003 the United Arab Emirates realised 10% growth despite the Gulf War, welcoming close to 6 million international tourist arrivals (Abdel-Ghaffar 2004). Since the 1990s hotel capacity in Dubai has quadrupled (UAE Ministry of Information and Culture 2001), and in 2003 "the tourism sector's contribution to Dubai's GDP exceeded 17 per cent and its indirect impact reached a whopping 28 per cent" (Rahman 2004).

3.2.1 Historical Constructions of Dubai

The most numerous and significant tribe of the UAE, the Bani Yas is made up of approximately 20 subsections. Originally centred in the Liwa oasis, the Al Bu Falah subsection resettled in 1793 in Abu Dhabi; from this subsection come the Al Nahyan family, who are the present-day rulers of Abu Dhabi. Traditionally the members of the Al Bu Falah tribe spent the winter with their camels in the desert, and many of them went pearling during the summer on the boats of other Bani Yas. The Al Bu Falah were the first to acquire property in the Buraimi oasis, and the members of the ruling family have systematically continued this policy until now. In 1833, a large, influential group of the Bani Yas moved to Dubai under the leadership of Maktoum bin Buti Al Maktoum. The Al Maktoum family, a part of the Al Bu Falasah section of the Bani Yas, continues to rule Dubai to this day (Heard-Bey 2001).

There are several theories as to how Dubai was named. One theory is that the word Dubai is a combination of the Farsi words for 'two' and 'brothers', the latter referring to Deira and Bur Dubai, the two parts of Dubai that are located on either side of the creek that splits the city in half. Others believe that 'Dubai' was so named by people who considered its souk a smaller version of a thriving market named 'Daba'. Another possibility is that the name came from a word meaning money - people from Dubai were commonly believed to have money because it was a prosperous trading centre. It is worth mentioning that there is another town named Dubai in the Al Dahna' region of Saudi Arabia, between Riyadh and Ad Dammam.

One of the foundations of the social culture of the UAE is the concept of the *majlis* (council), still common today in the Gulf States. The *majlis* is the publicly accessible part of any household where men congregate. "In the *majlis* of the sheikh as well as of the business men or of the fisherman on the coast, matters of state and matters of general interest are discussed, while the tiny cups of unsweetened light coffee with cardamom make the round" (Heard-Bey 2001: p. 114). Even today, many influential people still hold open *majlises*, which may be attended by both citizens and expatriates. As opposed to official offices or public agencies, many issues are discussed and decisions taken in the *majlis* of the ruler, which is perceived to uphold its own democratic system (UAE Ministry of Information and Culture 2004: p. 66).

Since the second world war, the Middle East has remained a region of constant turmoil, which has dramatically influenced the international public perception of this region, as will be illustrated later in this section by Said (1981). Of course, today, it would be hard for anyone to be ignorant of the instability in the region, but this state of affairs has not been without historical antecedents. Over the last half decade or so, colonial withdrawal, Arab-Israeli conflict, the issue of Palestinian refugees, cold war polemics, US-UK competition for political and economic power and access to the region and, of course, its rich oil resources, have all left their mark. For a brief historical overview of this "Middle Eastern Muddle" as it evolved the nineteen fifties, sixties, and seventies, and it historical relevance in today's geo-political scene, see Graham (1980).

Said (1978, 1991: p. 5), in discussing how, during this time and still today, the West constructs the Orient, pointed out that "ideas, cultures and histories cannot seriously be understood or studied without... their configurations of power also being studied". Pritchard and Morgan argue that: "tourism is clearly a cultural arena which reflects these configurations of power - thus, for instance, whilst colonialism may have been rejected economically, it continues to exert cultural power in terms of how tourism imagery constructs peoples and places" (Britton 1979 together with others referenced in; Pritchard & Morgan 2001). As Ateljevic and Doorne (2002: p. 650) argue: "this shift reflects a progressive perpetuation of Western ideology embedded in the power structures of global production and consumption. The so-called crisis of representation and (re)construction of the Other". With reference to the Arabian Gulf there are still political movements and scholars that content that the best approach to deal with the 'situation in the Middle East' (as if there were only one single issue involved) is re-colonisation for the sake of securing the world energy supply. As illustrated at length in Said's *Covering Islam* (1981) political discourse, reporting in the press and the opinion of 'experts' has a tremendous impact on the way we in the West think about the East.

As a starting point it is said that in a world that has become far too complex and various, the media, politicians and 'experts' oversimplify reality, for "ease and instant generalisations" (Said 1981: p. xii). The Orient and particularly Islamic societies have suffered from this for a long time until in recent years it has taken centre stage in world politics.

> At present, 'Islam' and 'the West' have taken on a powerful new urgency everywhere [now more so than nearly 25 years ago?]. And we must note immediately that it is always the West, and not Christianity, that seems pitted against Islam. Why? Because the assumption is that whereas 'the West' is greater than and has surpassed the stage of Christianity, its principle religion, the world of Islam – its varied societies, histories, and languages notwithstanding – is still mired in religion, primitivity and backwardness. Therefore, the West is modern, greater than the sum of its parts, full of enriching contradictions and yet always 'Western' in its cultural identity; the world of Islam, on the other hand, is no more than 'Islam', reducible to a small number of unchanging characteristics despite the appearance of contradictions and experiences of variety that seem on the surface to be as plentiful as those in the West (Said 1981: p. 10)

What Said addressed in 1981 as "*covering* and *covering up*" (p. xii), can still be observed today, maybe even more bluntly; one just needs to refer to Michael Moore's *Fahrenheit 9/11*. The horrifying events of September 11, 2001, has polarised the situation. As Said already stated in 1981: "Of no other religion or cultural grouping can it be said so assertively as it is now said of Islam that it represents a threat to Western civilization" (p. xii). The question is to what extent this historical, political and cultural discourse has influenced the image that people have of Dubai; arguably one of the most Westernised and liberal parts of the Middle East. It is hoped that many agree with Said's suggestion that: "respect for the concrete detail of human experience, understanding that arises from viewing the Other compassionately, knowledge gained and diffused through moral and intellectual honesty: surely are better, if not easier, goals at present than confrontation and reductive hostility" (Said 1981: p. xxxi).

Indeed, with the increase of travel and tourism, global connectedness and the spread of international media, Said's alternative approach opposing polemics, seems to have gained ground over the last 25 years. CNN or National Geographic Channel covering the Hajj pilgrimage in Mecca or insightful articles such as *Kingdom on edge: Saudi Arabia* in *National Geographic* (Viviano 2003), hopefully help in refining public opinion. In fact, after September 11, Middle East news websites experienced a surge in popularity in the UK as readers searched for alternative angles on the terrorist crisis (Gibson 2001) and in the US a renewed interest in the Middle East and Islam was observed (Moore 2001).

Nevertheless, "no writing [or teaching] is, or can be, so new as to be completely original, for in writing about human society… no interpretation is without precedents…and is *situational*… Knowledge of other cultures, then, is especially subject to 'unscientific' imprecision and to the circumstances of interpretation" (Said 1981: p. 155). One such example merits a last quote from Said:

> In order to make a point about alternative energy sources for Americans, Consolidated Edison of New York (Con Ed) ran a striking television advertisement in the summer of 1980. Film clips of various immediately recognizable OPEC personalities – Yamani, Qaddafi, lesser-known robed Arab figures – alternated with stills as well as clips of other people associated with oil and Islam: Khomeini, Arafat, Hafez al-Assad. None of these figures was mentioned by name, but we were told ominously that 'these men' control America's sources to oil. The solemn voice-over in the background made no reference to who 'these men' actually are or where they come from, leaving it to be felt that this all-male cast of villains has placed Americans in the grip of an unrestrained sadism. It was enough for 'these men' to appear as they have appeared in the newspapers and on television for American viewers to feel a combination of anger, resentment, and fear. And it is this combination of feelings that Con Ed instantly aroused and exploited for domestic commercial reasons, just as a year earlier Stuart Eizenstat, President Carter's domestic policy adviser, had urged the president that 'with strong steps we [should, *in original text*] mobilize the nation around a real crisis and with a clear enemy – OPEC'. There are two things about the Con Ed commercial that, taken together, form the subject of

> [Said's] book. One, of course, is Islam, or rather the image of Islam in the West generally and in the Unites States in particular. The other is the use of the mage in the West and especially in the United States (Said 1981: p. 3).

It is of interest here to identify to what extent this image influences consumer perceptions today, particularly with reference to destination Dubai. Although differentiation seems to be taking place, the same imagery still often dominates, because, to be fare, even Michael Moore, while attempting to provide a profound analysis of the Bush administration's actions after September 11, uses the same imagery to hastily conclude that Bush is sleeping with the enemy, i.e. we are implicitly told that in the past, Bush had meetings with white-robed Arab figures and had his businesses financed by Saudi capital, while many Al Queda terrorists come from Saudi Arabia, therefore this must be wrong. Would Timothy McVeigh responsible for the Oklahoma City bombing have a similar effect on image building with regards to the US as Osama bin Laden has on the Middle-East?

3.2.2 Dubai in the New Globalised Economy Today

> *The unprecedented rate of change we observe today is creating a new reality, one that affects each and every one of us politically, economically, socially and culturally. Therefore, we realize that the challenges we face are difficult* (Al Maktoum - H.H. Sheikh Mohammed Bin Rashid 2001)

Regardless of the continuous and possibly increasing geopolitical tensions in the region, Dubai is developing fast. Not only economically, but also in terms of its socio-cultural and technological environment. With prosperity and development Dubai has had to import vast numbers of foreign workers. The population of Dubai was estimated to be 971,000 in 2001. 80% of this population is comprised of expatriates with Europeans and Asians accounting for approximately 70% of households. Only 18% are UAE nationals and 13 % other Arabs. Approximately 71% of the population is male and 29% is female. The UAE population is expected to grow by 3.3% per annum to reach 4.15 million by 2010. Dubai is expected to have a population of 1.4 million by 2010 (Source: http://www.ddia.ae/population.asp). Together with the fact that the United Arab Emirates is the world's fourth largest oil-producer, it also is the world's richest state per capita. Since the discovery of oil, the changes have therefore been dramatic (http://www.uae.gov.ae/Government/country.htm, Introduction ¶2).

At the same time, of the total population in the Gulf Cooperative Council countries, more than half is still below working age (HSBC 2001). With such a young population it is not surprising that Dubai, the 'city of merchants', is a hotspot of innovation. Not only because, considering age structure and disposable income, this young population is IT-savvy, but also because investments in an information technology infrastructure and globalising industry and trade are seen to be preconditions needed to be able to employ this young population in the near future in challenging jobs. They will be looking for white collar jobs, while demands for labour will remain dependent on import. The social fabric of the local population and their prosperity does not yet create the conditions that encourage young Emirati to seek skilled employment. Emiratisation (localisation of jobs) initiatives are well under way in the financial and tourism sector, as appropriate jobs seem to be

available there outside of the public sector, which has traditionally been the main employer of local Emirati.

After the long established Jebel Ali Free Zone, which focuses on trade, manufacturing, assembly, and regional re-export from Jebel Ali Port, the government has created several non-industrial free-zones, in recent years, such as: Dubai International Financial Centre, Dubai Media City and Dubai Internet City. Free zones create a tax-free environment where companies are allowed to operate under 100% foreign ownership. Outside of the free-zones, taxation does still not apply, but at least 50% local ownership is mandatory. Such initiatives to diversify the Dubai economy are needed, as the oil resource of the Emirate are much smaller and are expected to run out much sooner than in the leading Emirate of Abu Dhabi.

The vision of the Dubai International Financial Centre is to position Dubai as a universally recognized hub for institutional finance and as the gateway to the region for capital and investment. Dubai's Government hopes that the DIFC will eventually stand on a par with international financial centres in New York, London, Hong Kong and Tokyo. Dubai Media City, in close proximity to Dubai Internet City, is the media community for the region. Inaugurated in January 2001, the vision behind Dubai Media City is to become a global media hub by creating an infrastructure, environment and attitude that will enable media focused enterprises to operate locally, regionally and globally out of Dubai. Some of the most widely recognized names in the global media industry including CNN, Reuters, CNBC, MBC, BBC, EMI and Lintas Middle East North Africa have established operations in Dubai Media City where the promise is one of having the 'Freedom to Create'. Dubai Internet City has played a key role in transforming Dubai into a hub for the new economy and is the regional centre for technology companies wishing to service the region. Dubai Internet City is home to 350 companies including Microsoft, Hewlett Packard, Oracle, IBM, Cisco, Compaq and MSN Arabia (www.ddia.com).

The UAE has the highest internet penetration rate in the region with close to 44% of its residents having online access (CIA 2004), compared to 31.6% on average in Europe (Internet World Stats 2004). Mobile phone penetration is 90%, comparable to Finland, with some segments in the market changing phones every 7 months, compared to 18 to 24 months in Europe) (*Aptec: UAE GSM penetration* 2003). Nevertheless, Piecowye (2003: Section. Introduction) found that the young female population of UAE National students demonstrate that they as "users of CMC [Computer Mediated Communication] technologies in diverse cultural contexts are not simply the hapless victims of globalization via CMC; rather, they are able to determine for themselves what elements of the local and the global they will accept, preserve, or reject in an active process of self-development in dialogue with the multiple cultures surrounding them…. More broadly, [Piecowye's] students stand as examples of users who can consciously choose what elements of global cultures they wish to appropriate while they simultaneously insist on preserving their own cultural values and practices". Piecowye's study involved a group of twenty-two female university students, of which 94% indicated that they were comfortable using computers and the Internet. "When asked if their [mostly unilingual Arabic speaking and uneducated] mothers used computers the unanimous answer was 'never'" (Piecowye 2003: Section. An Application with Students).

In another interesting study, Palfreyman and Al Khalil (2003) looked at the ASCII-isation of Arabic in Instant Messaging (IM, e.g. MSN or YAHOO Messenger) by female UAE National university students. "Analyzing ASCII-ised Arabic (AA) can give insights into ways in which CMC is shaped by linguistic, technological and social factors"(Palfreyman & Al Khalil 2003: Section. Abstract). The short extract in Table 3-1 shows a sample of the type of discourse studied. The left-hand column is the opening of an online conversation in the corpus used for Palfreyman and Al Khalil's study; the right-hand column shows an approximate English translation.

Table 3-1: Opening of a typical messenger conversation

D:	السلام عليكم ورحمة الله وبركاته	*D:*	*Hello there.*
D:	مرحبا حمده،، شحالج؟	*D:*	*Hi Hamda, how are you doing?*
F:	w 3laikom essalaaam asoomah ^__^	*F:*	*Hi there Asooma ^__^*
F:	b'7air allah eysallemch .. sh7aalech enty?? [pause]	*F:*	*Fine, God bless you. How about you?* [pause]
D:	el7emdellah b'7eer w ne3meh	*D:*	*Fine, great thanks.*
D:	sorry kent adawwer scripts 7ag project eljava script w rasi dayer fee elcodes	*D:*	*Sorry, I was looking for scripts for the java script project and my head is swarming with code.*
F:	lol	*F:*	*lol*

Note: From "A Funky Language for Teenz to Use": representing Gulf Arabic in Instant Messaging, by Palfreyman, D. & Al Khalil, M., 2003, *Journal of Computer Mediated Communication*, 9 (1), [Online], (Retrieved on September 30, 2004 from http://www.ascusc.org/jcmc/vol9/issue1/palfreyman.html). Reprinted with permission.

> Although some features of this extract are familiar from other types of CMC in other contexts (turns are typically short, for example, and emoticons such as ^__^ are used to represent emotive content), even a reader with no knowledge of Arabic will notice some linguistic complexity here. The first two turns of the conversation are in Arabic script, then both participants start to use the Latin alphabet instead. The latter part of this extract, although using a different alphabet, still represents Arabic, but letters are interspersed with numerals, and Arabic with English words.… ASCII (American Standard Code for Information Interchange) symbols are used to represent Arabic in IM and other electronic written communication (Palfreyman & Al Khalil 2003: Section. Introduction).

This could be perceived as a typical example of glocalisation as Palfreyman and Al Khalil found that even other Arabs, more specifically "non-UAE Arab teachers aged over 40… indeed find it almost impossible to read, apparently owing to unfamiliarity both with the orthographic conventions, and with the vernacular used" (Palfreyman & Al Khalil 2003: last ¶ before Conclusion section).In addition, respondents believed that this ASCII-ised Arabic in Dubai originated from UAE National friends and family members studying abroad, where Arabic language support on computers is not provided. This mix of local identity, tradition and globalization is well described by Ringle (2003: p. 1). Although

journalistic in style, it merits reference here, as it provides a good third-party account of the situation.

> At the Sheikh Rashid terminal of Dubai International Airport—a glittering temple of Ali Baba eclecticism and gateway to this 1,500-square-mile principality on the Persian Gulf—a visitor steps onto a carpet patterned after wind-ruffled desert sand, passes goldtone replicas of palm trees and continues past a shop-till-you-drop duty-free store where one can buy a bar of gold or a raffle ticket for a Maserati. A few steps away stands the special departure gate for Hajj pilgrims en route to Mecca. They have their own Starbucks counter. Beyond the terminal lies a startling skyline: high-rise hotels and office buildings of stainless steel and blue glass springing straight out of the desert, the backdrop to a waterfront where wooden dhows laden with Indian teak and spices from Zanzibar sail out of antiquity. Only ten minutes away, in the mind-numbing vastness of Deira City Centre, Dubai's largest suburban-style shopping mall, children in traditional Arab robes lose themselves in American video games. Veiled women, swathed in billowing black and sporting gold bracelets and diamonds, shop designer boutiques.

So, although the process of globalization in Dubai seems to move faster in some areas than in others, it also needs to be mentioned again, of course, that Dubai has experienced tremendous growth in tourism, which is reflected in Figure 3-1. Not only has demand soared, but so has supply. Figure 3-2 shows the growth in number of hotel beds between 1993 and 2003. The fact that this was a healthy growth is supported by the observation that occupancy levels in hotels remained stable and even increased in recent years. Also, the continuous growth in revenues shows a positive curve, as also depicted in Figure 3-2. This process of growth started in the early eighties when Dubai became a popular refuelling station on airline routes between Europe and Asia. The Dubai government then made a conscious decision to build a large scale resort hotel, outside Dubai in the empty desert along the coast. The resort, which was refurbished in 2003, tried to pull a stop-over market into Dubai, by offering a one-stop sun-drenched holiday destination including a 9-hole golf course, horse riding stables, shooting club and marina. This proved to be a lucrative decision and soon more resorts were built and the destination's attractiveness was enhanced with large luxurious shopping malls and tours and safaris into the desert. Of course, with economic growth and expanded trade links also came increased business travel to Dubai, creating the second pillar for a thriving tourism industry (F. Bardin, General Manager of Arabian Adventures and long standing member of the Emirates Group management team, personal communication, May 10, 2003).

Today, Dubai is a tourist destination in itself and the hospitality industry in Dubai is vibrant, with its own emphasis on technology, such as for instance: in-room WebTV; waiters and butlers with wireless PDA´s for communication and order-taking; online booking (obviously); and completely remote-controlled rooms (operating doors, curtains, lights, etc.). Figure 3-3 shows the changing tourism market structure in Dubai between 1992 and 2002. It shows that over two-thirds of the market originates from outside the 'developed world'. The Russian market, which used to visit Dubai to shop for products unavailable in their own country, is declining as retail has improved in Moscow in recent

years. From the West, only the United Kingdom and Germany are significant markets. Therefore, apart from sustained growth in these traditional Western markets, there must be tremendous future potential in other markets such as for instance the Benelux countries or Spain and Portugal, where Emirates Airlines has no direct flights yet and the Department for Tourism and Commerce Marketing has no regional office. Of course, Northern America holds promises as soon as geopolitical tensions between these regions subside, now that wide-body aircrafts make direct flight possible, even from the West Coast of the US.

But although positive in economic terms, the globalisation through tourism has also created its own socio-cultural issues, such as prostitution, access to alcohol and imbalances in cultural norms between hosts and guests. However, none of this has been studied or substantiated. Nevertheless, although one would expect public opinion to raise such issues particularly in the Gulf region, they seem to be more pressing in other Islamic societies in the Orient where one would less expect them. The Washington Post (Cooper 1997) for instance, already in 1997 reported on tourism in the Maldives. The government there bans tourists from bringing alcoholic drinks into the country. It provides vacationers with lists of Islamic rules aboard their flights to the Maldives and it actively discourages the local population from seeking employment in the hospitality industry in positions where they have to serve drinks. These are all policies that the UAE and Dubai governments do not apply. Only time will tell what the ambitious plans for Dubai's future will bring when it comes to the changing social fabric of the Emirati society. In any case, it is of interest to note that among others Magala (2002) has argued that the above described processes of globalisation, modernisation and "detrationalisation" could easily lead to a fundamentalist revival, which "contrary to appearances, is not a traditionalist come-back, but a post-modern sociotechnical invention, a politicised and rejuvenated, reconstructed religious ideology employed by social movements of alternative modernization" (Magala 2002: p. 8).

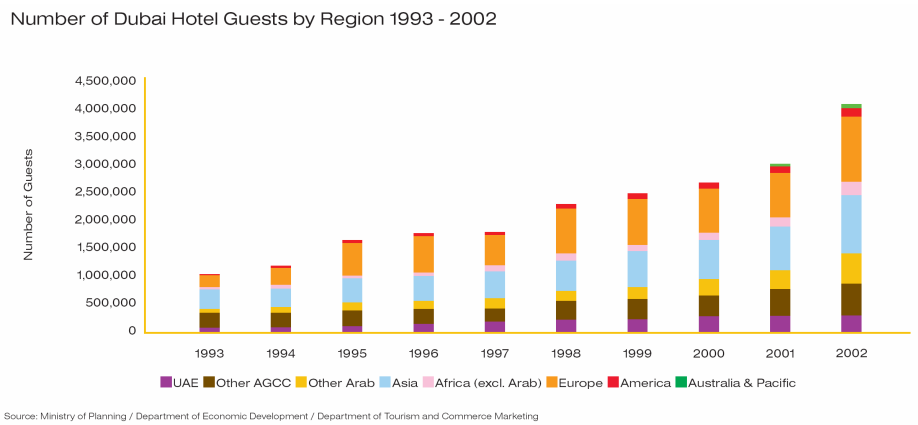


Figure 3-1: Market demand development in Dubai 1993-2002

Note: From *Dubailand Investor Brochure*, (2004), by Dubai Tourism Development Company, Dubai Development and Investment Authority.

Figure 3-2: Hotel performance in Dubai 1993-2002

From *Dubailand Investor Brochure,* (2004), by Dubai Tourism Development Company, Dubai Development and Investment Authority.

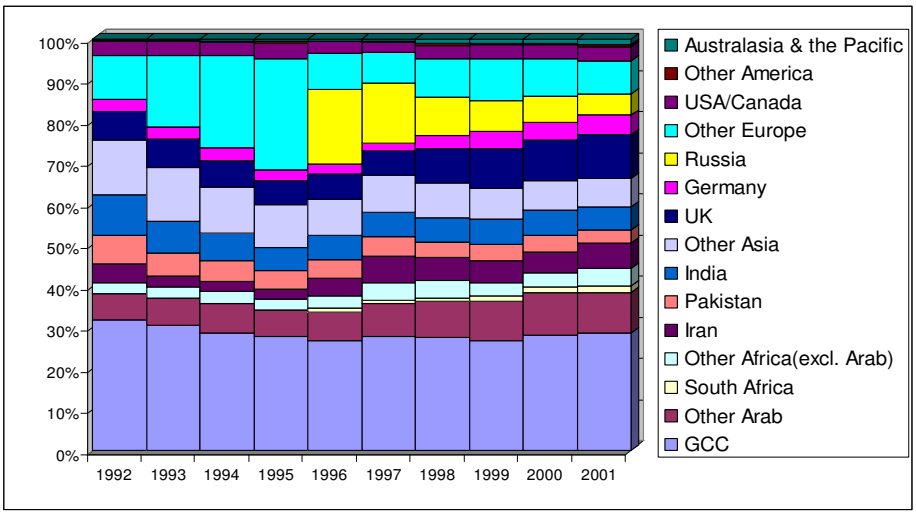


Figure 3-3: Changes in tourism market structure in Dubai 1992-2001
Note: Data from *Dubai Hotel Statistics (1992-2001),* (2003), Department of Tourism and Commerce Marketing, One Stop Information Center, retrieved on October 21 from http://dubaitourism.ae/www/OSIC/reports.asp?menuID=30&MenuStatus=1&SubMenuID=24 .

3.2.3 Diversification for the Future

To sustain its growth, Dubai is investing heavily in order to implement a well orchestrated long term vision, which includes all major components needed to fulfil the tourism industry growth strategy aiming for 15 million visitors by 2010 (Jenkins 2004). One of the most remarkable projects is The Palm. The Palm involves the creation of the world's largest two man-made islands known as The Palm, Jumeirah and The Palm, Jebel Ali, at a cost of US$ 1.5 billion each. Located just off the coast of the city of Dubai, the two palm tree shaped islands will increase Dubai's shoreline by a total of 120km and create a large number of residential, leisure and entertainment opportunities. Comprised of approximately 200 million cubic meters of rock, sand and earth, the two islands will eventually support 100 luxury hotels, 5,000 residential beachside villas, up to 3,600 shoreline apartments, 4 marinas, water theme parks, restaurants, shopping malls, sports facilities, health spas and cinemas. Particularly The Palm Jebel Ali will be a tourist destination in itself. The significance of the concept of designing the islands in the shape of palm trees is that it was inspired by Dubai's own heritage, with the date palm and water long considered to be the most important sources of life, providing the UAE people with food, shelter and simple boats, laying the foundations for trade, which has eclipsed the oil industry as the major source of Dubai's prosperity. Also, Arab Eclectic will be the signature architectural style on the Palm (Dubai Palm Developers LLC 2003). On top of that, the same investment company, Nakheel Properties, is building the World, 300 islands

protected by an oval breakwater and positioned to form the shape of the world map (see Figure 3-4). Lastly, in November 2004 a third Palm Island was announced off the coast from Deira, on the North-Eastern side of the creek. However, this one is planned to be much larger than the other two, with 41 instead of 17 fronds, extending Dubai's shoreline with another 400 kilometres (www.nakheel.ae).

Figure 3-4: Major ongoing development projects in Dubai
1. The Palm Jebel Ali, 2. The Palm Jumeirah (scale 5x5 km), 3. The World, 4. Gardens Shopping Mall, 5. Gardens residential projects for Jebel Ali port and free-zone area (left), 6. Jumeirah Islands, 7. Jumeirah Lake Towers and Dubai Marina, 8. International City (Courtesy: Nakheel Properties)

To attract the additional visitors, second home owners and residents to Dubai, major leisure and business projects are under way. Dubai Festival City spans over 1,600 acres on the banks of Dubai's historic Creek and is the Middle East's largest mixed-use real estate project. Dubai Festival City is also the new host to the Global Village fun-fare, which, with over 3 million visitors in 2003, is the biggest attraction at the annual Dubai Shopping Festival (Stensgaard 2003c). Other major annual events attracting many leisure travellers from around the world are: Dubai World Cup, the richest horse race in the world; Dubai Desert Classic golf tournament; Dubai Rugby Sevens, Dubai Duty Free Tennis Open and Dubai Summer Surprises.

Figure 3-5: Dubailand
(Courtesy: Dubai Tourism Development Company)

The boldest project so far, announced in fall 2003, is Dubailand. When completed, the US$ 5 billion plus Dubailand project will encompass over 45 leisure, entertainment and tourist facilities. The initial spadework on the project site, which will eventually cover 2 billion

square feet, has already started on the Emirates Ring Road. Dubailand has been designed to appeal to the widest tourist segments across genders, age groups, world regions and activity preferences. In total, it will incorporate 45 main projects and 200 sub-projects. It will include themed attractions in six main areas including: Attraction and Experience World; Eco Tourism World; Themed Leisure and Vacation World; Retail and Entertainment World; Sports and Outdoor World; and the Downtown area. The main feature of the shopping provision will be the proposed Mall of Arabia (Dubai Tourism Development Company 2003). Together with the adjacent Burj Dubai, the tallest tower in the world, which incorporates the US$ 1 billion Dubai Mall by Emaar Properties, both malls will be bigger than the Edminton Mall in Canada or the Mall of America in Minnesota (Jenkins 2004: p. 8).

In order to attract more business travellers to Dubai, the new Dubai International Convention Centre facility, completed in 2003 in order to host the IMF/World Bank conference, offers more than 15,800 square metres of meeting space and has the capacity to accommodate up to 11,500 delegates (Castillo 2003). Other major business projects with international appeal are Dubai Internet City, Dubai Media City & Knowledge Village, Dubai Commodities Market, Dubai Investment Park, and the brand new Dubai International Financial Centre, and Dubai Healthcare City.

In order to accommodate the increasing number of international visitors, 67 new hotel properties were planned for the UAE in the recent years (Stensgaard 2003d), one of the most remarkable ones being Madinat Jumeirah, one of the latest additions to Jumeirah's portfolio of flagship properties in Dubai, which also includes the Burj al Arab (or Arab Tower, built on a man-made island 200 meters into the sea, in the shape of a billowing sail of the local traditional wooden vessel called the *dhow*). Madinat Jumeirah focuses on sustainable tourism growth by taking advantage of Dubai's unique heritage and cultural identity in building a 900 bedroom Arabian resort. The resort includes three hotels, over 40 restaurants and cafes, a conference centre, outdoor amphitheatre, health spa, and souk and three kilometres of waterways winding through the resort with villas scattered around it, all designed using local UAE architecture and interior design (Jumeirah International 2003). On top of that, currently, the world's first underwater hotel "Hydropolis" is also being built.

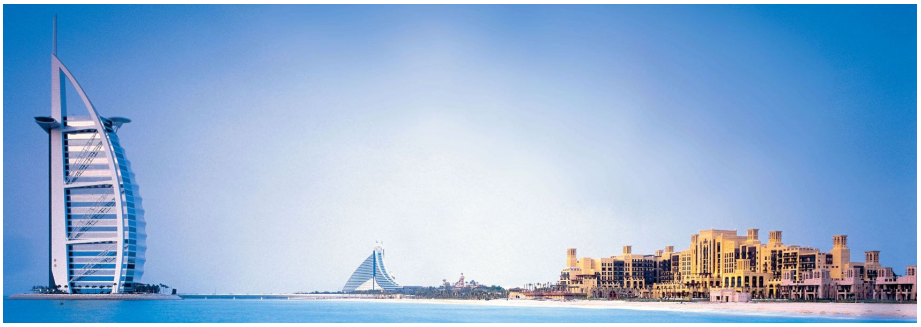


Figure 3-6: Jumeirah International Properties
Madinat Jumeirah (right), Burj Al Arab (left) and The Jumeirah Beach Hotel (middle)
(Courtesy: Jumeirah)

Another initiative focusing on sustainability and preservation of heritage is Dubai's new Desert Conservation Reserve, which will be centred on the Al Maha Desert Resort, the Emirates Airline Group's hotel outside the city. The resort will be expanded almost tenfold to form the heart of a new 225 square kilometre Conservation Reserve, safeguarding nearly 5 per cent of Dubai's land and unique desert habitat (Stensgaard 2003a).

Figure 3-7: Dubai International Airport
(Courtesy: Government of Dubai, Department of Civil Aviation)

Anticipating the increasing travel demands, intermodal transport systems have also been taken into account. Besides a rapidly expanding modern road network infrastructure, a luxury cruise terminal and a magnetic monorail public transport system in Dubai, the Dubai Department of Civil Aviation opened the US$540 million Sheikh Rashid Terminal in April 2000. In 2002, it catered to 16 million passengers. According to projections, 60 million passengers are expected by 2010. To meet the travel needs of the influx of travellers and airlines, the government of Dubai has committed to an expansion plan of US$ 4.1 billion for Dubai International Airport and its affiliated divisions (Rahman 2003). In line with this projected growth of the Dubai travel hub, Emirate Airlines flew in the face of the struggling airline industry by announcing the largest ever aircraft order at the 2003 Paris Air Show on top of the orders already registered in 2001 at the Dubai Air Show, now bringing the total order book to US$ 26 billion (Stensgaard 2003b).

3.2.4 Organisation of Tourism in Dubai

There are several organisations that provide the institutional framework for the diversification of the economy and the development of the tourism sector in particular. In general, the development strategy was formulated by government which has acted very

much in an enabling capacity, providing the vision, initial infrastructure and investment to attract private sector investors. “With business-friendly policies in a tax free environment, there appears to be no shortage of private sector companies and individual investors wanting to participate in these projects. To assist this process, the government has set up a number of specialist departments” (Jenkins 2004: p. 9).

The Economic Department was established in Dubai, on March 18, 1992. In 1996 the name was changed to the Department of Economic Development. The Department is responsible for the economic planning and reporting for the Dubai economy. It also has responsibility for business licensing, the protection of industrial and trade property rights, business regulation and registration; strategic business planning for Dubai; identification of opportunities for investors; and it offers assistance with project planning and execution (www.dubaided.gov.ae).

The Dubai Development and Investment Authority (DDIA) has a specific role as an investor in major development projects in Dubai. In October, 2003 it announced the launch of the Dubai Tourism Projects Development Company. Mohammed Al Gergawi, DDIA Chairman said the new company, will provide "single-window" services for investors and project executers. "As part of DDIA, it will ensure a developed infrastructure that is supported with quality services. This will highlight the commitment of the government to provide a supporting environment for the prosperity of businesses, and allow at the same time investment opportunities within an active [tourism] sector with high potential” (New firm manages Dubailand 2003) (www.ddia.ae).

Established in January 1997, the Department of Tourism and Commerce Marketing (DTCM) has two main areas of responsibility. The first of these includes all the functions of the former Dubai Commerce and Tourism Promotion Board (DCTPB), which had been in existence since 1989 and concentrated on the international promotion of Dubai’s commerce and tourism interests. The DTCM’s second main area of responsibility is as the principal authority for the planning, supervision and development of the tourism sector in the emirate. As part of its marketing role, the DTCM plans and implements an integrated programme of international promotions and publicity activities. This programme includes exhibition participation, marketing visits, presentations and roadshows, familiarisation and assisted visits, advertising brochure production and distribution, media relations and enquiry information services. In addition to its head office in Dubai, the DTCM has 13 overseas offices. In assuming its administrative responsibilities within Dubai, the DTCM has now taken over the licensing of hotels, hotel apartments, tour operators, tourist transport companies and travel agents. Its supervisory role also covers all touristic, archaeological and heritage sites, tourism conferences and exhibitions, the operation of tourist information services and the organisation and licensing of tour guides (www.dubaitourism.ae).

The Dubai Shopping Festival (DSF) Committee coordinates the festival which takes place each year between January 15 and February 15. Held for the first time in 1996, Dubai Shopping Festival has been a milestone in the development of the nation's travel industry, for it brought together the private and public sectors. Until 2002 covering the month of March, DSF was conceived as a pure retail event, the primary aim of which was to

revitalise the retail trade in Dubai. It was later developed into a comprehensive tourism product in line with Dubai's far-sighted stance to set global standards in every field. Attractions include the Global Village fun fare and expo, several fireworks shows every night, theatre and music performances in public parks, street artists, fashion shows, sporting events, a night souk, desert camp, and, of course, daily raffle draws totalling a value of over 1 million dollars including cars, cash and gold. Each year the Festival increases in size and scope and in 2004 there were 3.1 million visitors spending just over one and a half billion dollars. The DSF committee is also responsible for organising the Dubai Summer Surprises (DSS); a smaller version of the shopping festival, but stretched over the summer months, primarily aiming at entertaining resident families in order to discourage people from travelling abroad for long periods while escaping the summer heat. So apart from entertaining the children, DSS is needed to keep retail afloat for this quiet period of the year between beginning of June and end of August (www.mydsf.ae, see also (Gabr 2004)) .

The Dubai Chamber of Commerce and Industry (DCCI) was established in 1965 in order to defend and protect the general economic interests of its (currently) 45.000 members, promote business development and investments opportunities in Dubai and to facilitate network opportunities and interaction of members with the local, regional and international community. The Dubai Chamber of Commerce and Industry has sector groups and committees representing economic sectors, such as the Travel & Tour Agent group, the Exhibitions & Conferences Organisers group, the Land Transport group and the Food & Beverages manufacturing group (www.dcci.gov.ae).

The Department of Civil Aviation is responsible for managing Dubai International Airport, which was established in 1959 when the late Ruler of Dubai, H.H. Sheikh Rashid bin Saeed Al Maktoum, ordered the construction of the first airfield, located only 4 kilometres away from the city centre. In 2003 over 18 million passengers passed through Dubai International Airport. Dubai Duty Free celebrated twenty years of operation on 20 December 2003. Record sales of US$380 million in 2003, resulted in Dubai Duty Free being ranked No. 3 in the world after high-traffic airports such as London Heathrow and Seoul Incheon Airport. Raffles of cars, cash and gold are also a major attraction at the airport duty free (www.dca.gov.ae and www.dubaidutyfree.com). Managed by the same person, H.H. Sheikh Ahmed Bin Saeed Al Maktoum, another major contributor to tourism in Dubai is the Emirates Group. Booking record profits year after year (US$ 476 million on revenues of US$ 3.8 billion in 2003), the group virtually integrates the whole tourism value chain in Dubai with daughter companies Emirates Airline; tour operator Emirates Holidays; destination management company Arabian Adventures; and DNATA as the ground handling and travel agent organisation (www.ekgroup.com).

Dubai Municipality, established in the 1940's, designs, builds and manages the municipal infrastructure and other related facilities. Responsibilities that are relevant to tourism includes the maintenance of seven public parks, three of which include beach facilities. Other relevant activities include coastal zone monitoring and public transportation services. Of significance is also the landscaping of all major public roads, intersections and other public areas, which all needs to be done through irrigation. In fact, the city's waste water is collected and purified so that desalinated water can be used twice, first for

households, then for irrigation. The municipality's Historical Buildings Section takes care of architectural conservation and maintenance of historical sites (www.dm.gov.ae). The section contains three units: the Design, Conservation, and Interior Design Units. The Design Unit is responsible for building studies and overall design prior to restoration. The Conservation Unit is responsible for the construction process of the restoration. The Interior Design Unit is responsible for preparing the restored building for use by adding the interior furnishings (Gabr 2004: p. 235).

To facilitate the smooth execution of major development projects (such as the Palm, Dubailand or The World), new projects are controlled from the Executive Office of the Crown Prince. This office discusses projects with potential partners and signs the necessary contractual agreements before making any public announcement. Project implementation is then assigned to a specific person or agency that has the full responsibility for implementation. This system avoids duplication of responsibilities and ensures that a single contact point is established and known. Investment companies such as Emaar and Nakheel Properties are responsible for implementing some of the major development projects. Emaar Properties is a public joint stock company listed on the Dubai Financial Market. It is responsible for developing Dubai Marina, Burj Dubai and other residential projects such as Arabian Ranches, Emirates Hills, Emirates Lakes, The Greens and others. Nakheel Properties is responsible for projects such as The Palm, The World, International City, The Gardens, Jumeirah Islands, Jumeirah Lake Towers and Discovery Gardens (www.emaar.com and www.nakheel.ae).

3.2.5 Success Factors

In *Sand to Silicon* Sampler and Eigner (2003) outline a model of how the large-scale rapid growth of Dubai has been achieved and they pinpoint the reasons for Dubai's success:

- Leadership that is visionary, inspirational and embraces risks, that is demanding but supportive, and that builds confidence;
- A leanness of organisational structure and bureaucracy, which helps to speed things up;
- Openness to outside influence and competition, and to the views of all stakeholders;
- Good communication channels and access to decision-makers;
- A business culture founded on trust - but not without regulation where it is necessary to reinforce trust and confidence in the system.

Jenkins (2004: p. 12-14) elaborates on a few similar plus additional observations about some of the underlying factors of the success of development in Dubai, in particular in the area of tourism development.

1. First, the ruling family and particularly the Crown Prince, His Highness General Sheikh Mohammed bin Rashid Al Maktoum, have been the main source of entrepreneurial vision. By any comparison, Dubai's transformation from a desert sheikhdom relying almost exclusively on entrepot trade to a cosmopolitan, urban centre with high standards of living and amenities has been remarkable. Equally noteworthy has been the choice of tourism as a major input to the development

and diversification strategy. Despite the Arab tradition of offering hospitality to travellers, commercial hospitality reflected in meeting the needs and demands of international travellers, is a different dimension. It reflects well on the tolerance of the ruling family and the Emirati that this development has taken place without upsetting the cultural norms which prevail in Dubai, the country and region. There are two other aspects of the ruling family's intervention into the development and diversification process. The family is known to be substantial investors in projects and therefore are risk-takers themselves and this provides other investors with a greater degree of confidence in projects. Another feature is the short chain of decision-taking which is retained in the Crown Prince's Executive Office until projects are officially announced and responsibility for implementation is allocated to an individual or organisation. Implementation strategy is related to very tight contractual deadlines which are monitored. The ruling family is effectively the government and is an example where government is providing an enabling environment to attract private sector partners (also supported by (Ringle 2003)).

2. Second, what is noticeable in the Dubai experience is the integrated nature of development. Each sector with development potential has been activated. Infrastructural investment is not only project specific but also general. Massive investment in roads, utilities, transportation, and the airport for example, benefit all sectors to include tourism, real estate, and industry. In particular there is a very heavy investment in information technology, e.g. Internet City. In many ways what has happened and is currently happening in Dubai very much reflects the past experience of Singapore.

3. Third, the development philosophy is based on the Public Private Partnership (PPP) model. The importance of the ruling family, its participative involvement in projects, and its continuing entrepreneurial vision and energy has attracted national and international investors. The Dubai International Financial Centre initiative is not only another way to diversify the economy but will provide a means of gathering financial resources from the region and channelling them to projects within the region rather than seeing them flow out from the region which is the current situation.

4. Fourth, all new projects aspire to match if not surpass best international standards. This is noticeable in the tourism and leisure field where projects have been aimed at the high-end of the markets. With increasing investment in this sector, land prices are rising fast and this in turn affects the types of projects which are commissioned. This trend in part explains the mega-project approach and the emphasis given to build 'the biggest and best.' The national carrier Emirates reflects this trend with the purchase or lease of an ultra modern fleet, achieving award winning service, and in extending its network. It is one of the few airlines to be consistently profitable since the September 11th, 2001 terrorist incident.

5. Fifth, another aspect of development has been the preference for what can be called iconic projects. There is a case to suggest that in building the Burj Al Arab

hotel, Dubai has created its own international icon which like the pyramids in Egypt and the Taj Mahal in India, is readily identified with the country. Following from this the announcement of Dubailand, the first under-sea hotel, Palm Islands, World Islands, and the current construction of 'the world's highest building' to be named Burj Dubai, all seek to anchor Dubai onto the international tourism map. It is noticeable that the Burj Al Arab is able to charge strictly limited groups of tourists $40 per person for a guided tour of the property!

6. Sixth, is the apparent ready stream of investors in the new projects. No figures are available for the capital investment in development or in the tourism sector. What can be said is that much of the mega projects are and will be private sector financed. The development of a real estate market, even without a finalized legislative framework, has seen many of the local and international banks create a mortgage market. It is very unusual for financial institutions to create such a market without a legal framework but such is the reputation of Dubai's rulers that it does not seem to have been a hindrance.

7. Seventh, it is also noticeable that the rapid development and transformation of Dubai seems to have taken place without social and cultural upsets. Local people seem to be tolerant of visitors perhaps because there has been a very large expatriate community in the emirate for a long time. It may also be that visitors have been informed of the cultural and social norms prevailing and respect these. This is an area which requires specific research. But regular reading of the local newspapers and the letters columns has shown no evidence of any articles or comments on tourism affecting local social and cultural norms. This does not mean that changes have not occurred but it does suggest that these have not been particularly negative. Another factor might be the preponderance of visitors from the Gulf Co-operation Council countries (approximately 37 per cent of the market [see Figure 3-3]) who are mostly Arabs and Muslims and are well aware of cultural parameters.

But, of course, there are downsides to this rosy picture. Questions are being raised about over-supply of tourism assets particularly in the hotel and shopping sectors. The first is not of immediate concern, as long as the DTCM is able to continue to attract yearly increases in visitor arrivals as projected in the strategic plan (see Figure 3-8). Shopping and the proliferation of malls are of concern. As the Director of Leasing and Marketing for Dubai Festival City said in an address to the Middle East Council of Shopping Centres "Overbuilding is prevalent, the captive radius is shrinking, and with it, customer numbers. This situation is compounded by the fact in some malls landlords and retailers are facing a situation where the same shopping experience is available in several locations, driving down footfall rates" (Shopping developments in Dubai 2003: p. 40).

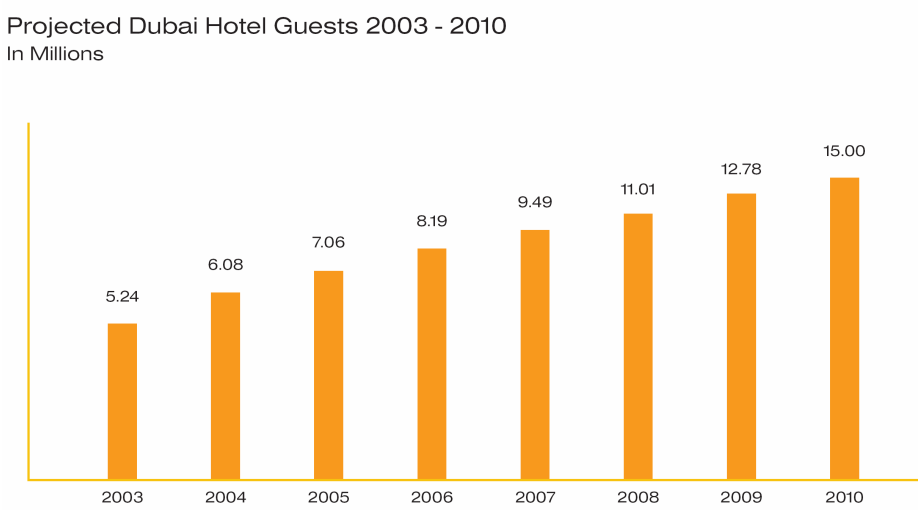


Figure 3-8: DTCM projections of number of hotel guests in Dubai

Note: From *Dubailand Investor Brochure*, (2004), by Dubai Tourism Development Company, Dubai Development and Investment Authority.

3.2.6 Dubai's Cultural Identity

As Cooper (2003) puts it: "This vision of modern Arabia [as presented above] is somewhat different from the view often presented by the Western media which understandably focuses on regional tensions rather than regional success stories". In an effort to try to change this situation, the Dubai Department of Civil Aviation has embarked on a campaign reflecting the contrast between modern Dubai as an attractive global business hub and the respect for tradition, heritage and local culture at the same time. In eleven roughly one-minute Cultural Voyage Vignettes that precede the Dubai Duty Free and International Airport advertisements on CNN International, the government tries to create a global awareness for the rich cultural identity of the UAE people. Short interviews with ordinary local Emirati reflect traditions such as: henna body painting by an Emirati lady wearing her *abaya* (or full-length black dress and the *shaila* covering her hair); the use of perfume and incense burning by a local lady wearing the *burqa* (or face mask covering the nose and mouth, only used by traditional Emirati Bedouin women); pearl diving on a *dhow*; falconering in the sand dunes by Emirati men dressed in their traditional *dishdash* and *gutra* (the white full-length shirt and headscarf still used today, the latter held in place by the *agal*, the black cord wrapped around the head); the building of *dhows*; calligraphy; the traditional *liwa* band consisting of local Emirati men dancing to live music (i.e. drums (*tabl*), mizmar (*flute*), goatskin back pipes (*mizwid*) or an *oudh* (lute)); Arabic poetry and song writing; existing traditional Bedouin herding camels in the desert; and lastly a small episode on the Bastaqya, the restored historical buildings along the Dubai creek, which was where trade originally began (Mansson 2003).

Particularly with respect to the "conservation of local architecture" and the "harmonious urban development that combines authenticity and synchronism" (Dubai to host 2003), the Government of Dubai and the Department of Tourism and Commerce Marketing and Dubai Municipality in particular, have made considerable efforts by restoring many of the typical *barasti* houses. These houses are characterised by the square wind tower or *baadgeer*, open on four sides to catch gusts of wind and funnel them inside as a form of air conditioning, with the highest of these located above the bedroom. Many of these have been restored in the Bastaqya area, as has been the Dubai Museum, housed in the old Al Fahidi Fort and H.H. Sheikh Saeed's House, the official residence of the late Sheikh Saeed Al Maktoum, Ruler of Dubai (1912-1958) and grandfather of the present Ruler, H.H, Sheikh Maktoum Bin Rashid Al Maktoum. Lastly, a traditional heritage village, located near the mouth of the Creek, has been created where potters and weavers display their crafts. "Here the visitor can look back in time and experience some of Dubai's heritage. The Diving Village forms part of an ambitious plan to turn the entire Shindagha area into a cultural microcosm, recreating life in Dubai as it was in days gone by" (Government of Dubai - Department of Tourism and Commerce Marketing 2003).

Registration of the historical buildings as world heritage sites with ICOMOS Unesco, is also "followed up with urgency…as it will raise the importance of these buildings to the international level and help boost tourism" even further (Step to get 2001).

Figure 3-9: Dubai's heritage in the Bastaqya and Shindagha area
(H.H. Sheikh Saeed's House) (Courtesy: Government of Dubai, Department of Tourism and Commerce Marketing)

During festive seasons such as the religious *Eid* holidays, national day or festivals and events, these locations, in particular heritage village and H.H. Sheikh Saeed's House, are used to host festivities and fairs (Gabr 2004). Traditional *liwa* bands perform together with dance groups; there will be plays and other stage performances; wedding rituals; local arts, antiques and handicraft markets; and traditional food stalls. All these examples of tourism development where heritage builds the "sense of place" and constructs the identity of a nation (Go et al. 2004; Jansen-Verbeke 2004; McLean & Cooke 2003), both in terms of building the infrastructure, product development as well as the marketing, and a good example of tourism being a vehicle for preservation (Go et al. 2004). Also, it instigates some level of appreciation for the local culture with tourists whose primary reason for visiting a location is not for the local culture (but often the sun, see, sand and shopping in the case of Dubai). Gabr (2004) supports this notion, although through a dubious survey of residents and domestic tourists in Dubai, by concluding that both, residents and tourists, have a positive attitude towards the restoration of historical buildings and their utilisation as a ways to build respect for one's past as well as to create attractions for visitors. The use of historic buildings during festivals and events for museum-like and cultural purposes is also perceived to be positive.

As Van Rekom and Go (2003) argue, this form of "staged authenticity" (McCannell 1973), "is a strategy that can work, both in publicity campaigns designed to foster identification with (and of) a distinct local community and campaigns to promote active citizenship" (supported by Onians (1998)). So much so in fact, that during the festive seasons these facilities are flooded with Emirati men and women and other Gulf nationals, even many of them in their twenties, to join in the festivities. The very few (non-Arabic) tourists who actually visit these places during these periods (Ramadan, for instance, is normally not a busy season for Western tourism) are difficult to spot in the crowds and one has the impression to witness a 'genuine event', which Cohen (1988) would refer to as an event of "emergent authenticity" in contrast to "staged authenticity". As Van Rekom and Go (2003) indicate, the staged or emergent authenticity therefore seems to "fit with the way in which the local identity is constructed, imagined and experienced by the local community members" and is at the same time used as a way to react to recent geopolitical events in a positive way to promote Dubai's rapid development as a global hub, but at the same time not denying its roots. This chapter will analyse to what extent these efforts are also reflected in the projected imagery of Dubai online.

3.3 Content Analysis Methodology

Dann (1996a) has argued that the visual and textual content of brochures are important in aiding a conceptualisation of place and have been studied in literature. Fesenmaier and MacKay (1996: p. 41) also state that the "analysis of media messages has been tackled from a variety of theoretical and disciplinary perspectives" and indeed text and pictures seem to have been the main instruments since long (Uzzell 1984). Pritchard and Morgan's study (2001), which was discussed in chapter 2, is similar to what will be reported here, although their approach was based on content analysis of physical brochures. It seems that in tourism research this has not been done in an online environment, yet. Therefore, this

section will look at the online projected tourism destination image of Dubai, also in terms of pictures and text.

Although the Middle East has a relatively small but growing online population (6,7%) (Internet World Stats 2004), the UAE has the highest penetration rate in the region with close to 44% of its residents having online access (CIA 2004). Therefore, the many recent regional and local initiatives to bring the tourism industry into the online marketplace (such as mytravelchannel.com on MSN Arabia, online booking at emiratesairline.com, reserving your dinner at diningindubai.com, or booking your tour with one of the online local tour operators) are timely. This is supported by the Emirate's drive to take up a strategic position in the new economy, endorsed by the creation of Dubai Internet City. The observations above show that it is bearing fruit. However, much more pertinent in this context, is Dubai's dependency on international visitors when it comes to sustaining its tourism industry's growth. European tourists constitute a large and growing market segment, being the number one source market, representing 25% of the total market in 2002 (Bin Sulayem 2003) and having generated over one third of the total number of nine million guest nights in 2001 (UAE Ministry of Information and Culture 2003: p. 152). On average, these tourists spend a whole day longer in Dubai, compared to any other visitor. In Europe, online bookings increased by 39% in the first eight months of 2004. 30% of pre-booked trips by Europeans went through the Internet (European Travel Monitor 2004). Therefore, considering the advancement of Dubai in the online market place and the importance of the European market, it is timely to study the destination image that Dubai is projecting online internationally.

3.3.1 Data Collection

To sample the imagery, an online search was conducted to locate Dubai based tourism company websites. Only Dubai based websites were identified under the assumption that these would belong to organisations that would generally be responsible for creating the projected destination image of Dubai (i.e. they would be the sources of the overt induced agents). Foreign intermediaries (tour operators and travel agents) and cybermediaries (e.g. Expedia, Lonely Planet or Travelocity) were not considered, as the government or industry in Dubai would normally not be able to influence the image projections by these actors directly. At best these would be covert induced agents, using Dubai based organisations as secondary sources of information. In practical terms, trying to include all non-organic information sources available on the Web would just be an impossible task. As an indication, a Google search for 'Dubai AND tourism' yielded 540,000 results. Nevertheless, this part of the research project aimed at meeting part of research objective 2: To analyse the extent to which the projected images online correlate to the destination's identity: its authenticity, cultural heritage and natural resources. The projected image would cover the online overt induced agents, not other online information sources, as they are outside of direct control of destination management.

Finding Dubai base websites was done by screening the links detailed on local portals containing tourism directories, such as: the Government of Dubai's Department of Tourism and Commerce Marketing (www.dubaitourism.co.ae); the Dubai E-Government Portal (www.dubai.ae); AME-Info (www.ameinfo.com); UAE Interact (Official website of

the Ministry of Information and Culture in the UAE at www.uaeinteract.com); and Emirates Internet & Multimedia (the national Internet provider at www.emirates.net.ae, part of the national telecommunications company Etisalat). Lastly, a search on the keyword "tourism" was conducted on the complete list of websites registered in Dubai as provided by the Abu Dhabi Chamber of Commerce and Industry (www.adcci.gov.ae/pls/uaesites/ uae_web_sites_emirates.search).

Twenty websites were located and saved in a Favourites folder, using Microsoft Internet Explorer's "Offline Web Pages" tool. The maximum number of 3 links deep from the websites' homepages was downloaded to hard disk, following only links within the same website, without specifying a disk space usage limit and including downloading of images. From the twenty websites, a total number of 3,600 JPEG and GIF files was collected. 2,550 small images of less than 10 kilobytes were immediately deleted under the assumption that those would include only buttons, icons, lines, banners and other design elements. Of the remaining 1,050 images, 74 were doubles of the same image on the same website, and were therefore overwritten during cataloguing. Of the 976 viewed images, still another 38 images were deleted as they consisted of banners, backgrounds and navigation menus. Another 433 images were excluded from the analysis for various reasons. These included: 11 images of bad quality, which were difficult to analyse; 5 images of cargo at an airport or seaport, irrelevant to the locality; 8 images representing irrelevant business settings, not showing specific related facilities available in Dubai; 11 images of irrelevant objects not related to tourism in Dubai; 84 images consisting of logo's, banners and ads; 48 geographic maps; 6 images of non-branded aeroplanes in flight and cars on non-Dubai roads; 83 images of other countries; 72 images of other Emirates; 42 press-related images; 44 images representing text; and 19 images of unknown individuals without context or within an irrelevant non-Dubai related context. The remaining 505 images included in the analysis were distributed as depicted in Table 3-2.

Table 3-2: Sample distribution

		Private	*Semi-government*	*Government*	***Total***
Tour Operator	No. of Websites	13	2		*15*
	No. of Images	255	47		*302*
	No. of Words	26,075	16,156		*42,231*
Air Transport	No. of Websites		1		*1*
	No. of Images		56		*56*
	No. of Words		5,398		*5,398*
Hospitality	No. of Websites	2	1		*3*
	No. of Images	51	48		*99*
	No. of Words	13,770	14,373		*28,143*
Destination Marketing Org.	No. of Websites			1	*1*
	No. of Images			48	*48*
	No. of Words			16,709	*16,709*
Total	**No. of Websites**	**15**	**4**	**1**	***20***
	No. of Images	**306**	**151**	**48**	***505***
	No. of Words	**39,845**	**35,927**	**16,709**	***92,481***

Subsequently every page on every site was manually browsed and superficially scanned for its textual content. All full text paragraphs of 2 or more sentences were cut and pasted into a separate word document for every website. Most webpages were included, except

for: pages that relate to other Emirates; press sections; listings of hotel information, if not on the hotel website itself; listings of brief destination related facts (e.g. exchange rates, telephone numbers, seasonal temperatures, holidays, languages, visa information, etc.); and bullet pointed sections, unless part of a larger piece of text.

That way, from the twenty websites, a total number of 92,485 words was collected, distributed as depicted in Table 1. In total: 15 tour operators, 3 hospitality management companies, the DMO (Government of Dubai: Department of Tourism and Commerce Marketing) and airport website were analysed. Only the DMO is a pure government organisation, but 2 tour operators, 1 hospitality management company and the airport are semi-government, part of government control structures, but managed as private entities. Not surprisingly, the DMO and the semi-government hospitality management company, had the most text and images on their websites, which corresponds to the total website size, being the largest two as well (16,709 words / 48 images / 30 MB; and 14,373 words / 48 images / 74 MB respectively). The airport website had the most images (56), but not as much text and an average website with 17MB. Apart from one tour operator with a website of 18 MB (and 40 images), all other websites were smaller than 6 MB, 6 of them being smaller than 1 MB.

Apart from pictures and text, no other content, such as audio, video or experiential content (including stimuli affecting additional sensory modalities, such as tactile, proprioceptive, or olfactory senses) (Hoffman & Novak 1996) was located on the websites sampled.

3.3.2 Content Analysis of Pictures

The need for tourism researchers to embrace image-based research has been contended by Feighey (2003). The 505 images included in the analysis were content analysed in terms of motifs (objects or appearances) and themes (or focal themes), as applied in other studies of tourism photography (Albers & James 1988; Markwell 1997; Sternberg 1997). Content analysis of motif was performed at three levels as suggested by Sternberg (1997: p. 957-959): first, identification of the actual objects (setting up what is staged); second, identifying the arrangement (which objects are shown together, or clustering); and third, identifying the contextualisation (or the surrounding context).

In the first instance, all the motifs appearing in every image were listed. Then, with each image being a case, for each object a separate dichotomous variable was created in SPSS to indicate if the specific object appeared in the picture or not (0=no, 1=yes). This allowed for measurement of distribution and frequency, but also for analysis of variance, treating the variable as interval scale. In the second instance, correlations between these variables were calculated, which would indicate if objects often appear together (positive correlation) or not (negative correlation). By doing this objects were clustered by the level at which they correlate, identifying arrangement. Lastly, the arrangements were correlated with contexts (e.g. desert, sea, creek) to identify contextualisation and finally the focal theme of the image.

In a final note it needs to be emphasised that tourists appearing in the images, were not treated as ‘objects’ but as ‘subjects’ (Gallarza et al. 2002: p. 64). In none of the images

analysed, tourists were the focal appearance. As indicated above, the few images where this was the case, were excluded from the analysis as press release related material (many websites have a press section). Rather, the appearance or absence of tourists in images was used as a way to distinguish between tourist gaze (Urry 2002) or experience (or performance) (Fairweather & Swaffield 2002; Garlick 2002; Urbain 1989). Fairweather and Swaffield (2002: p. 294) propose an interesting metaphor in this respect, using the graded experience of the Elizabethan theatre, "in which some of the audience become active participants, some choose to remain detached spectators, and others move between the two. Furthermore, watching others in the audience perform becomes part of the experience". In order to operationalise this, for arrangements in which tourists appeared, the focal theme was defined as being experiential, and in case of absence of any tourists, the focal theme was defined as representations or reflections of objects and activities. Additional support for this was found the concept of "telepresence" (Hoffman & Novak 1996; Shih 1998), where it could be argued that the appearance of tourists in the images facilitates the consumer to project oneself into the actual experience.

3.3.3 Content Analysis of Text

To analyse the textual element of the websites, we made use of CATPAC, which is a self-organising artificial neural network software package used for content analysis of text. "CATPAC is able to identify the most important words in a text and determine the patterns of similarity based on the way they are used in the text" (Woelfel 1998: p. 11). The theoretical foundation for CATPAC is based on an area of cognitive science, called neuroscience, which is a branch of psychology. Neuroscience is the study of the functioning of the nervous system which includes the structures and functioning of the brain and its relationship to behaviour. Artificial neural networks are computing systems which mimic the brain through a network of highly interconnected, processing elements, which give them learning capabilities and enable them to recognize, and to understand, subtle or complex patterns.

In simple terms, CATPAC produces a frequency table and proximity matrix for the most frequently used words in the text. "Neural network software like CATPAC is modelled to operate like the structure of the human brain and like the human brain the software recognizes patterns of words and learns the regularities of co-occurrences of patterns. Moreover, if words are connected repeatedly the network will 'learn' the pattern, while patterns which are presented will seldom fade. The most frequently used words of a text build the nodes/neurons of the network. The relations between these words are defined by the co-occurring of the words in one unit. Connections between words co-occurring in a unit are strengthened, if words are co-occurring in a unit, otherwise the connection values are reduced" (Züll & Landmann 2004: p. 2) The unit of analysis is a sliding text window chosen by the researcher. Default window size is 7 words, i.e. CATPAC moves a window of 7 words across the text and calculates word proximities based on the number of times words are found together (or not) within these frames. Alternatively the window of analysis can be case-based, i.e. CATPAC calculates word proximities based on the number of times respondents use words (or not) in each response to a question. The former approach was used in this study (a window of 7 words), the case-based approach is used in the following chapter. The advantage of CATPAC over other software is that the

researcher does not need to build a dictionary of words that the software should search for (Züll & Landmann 2004). CATPAC will work with any and all words in the text; produce a frequency table and then perform the neural network analysis on the top-X most frequently found words. X (i.e. the maximum number of words to be included in the analysis) is to be defined by the researcher. However, words incorporated in an exclude file are ignored. A default exclude file containing words like articles, prepositions, and other "meaningless" words is provided with CATPAC, but the researcher can incorporate additional words in de exclude file.

Summarising, CATPAC identifies subtle and complex patterns in any documents or qualitative survey responses it processes and is therefore ideal for analysing long pieces of text or high quantity qualitative data in order to identify the main concepts that authors of such texts or respondents like to convey. It would go beyond the object of this paper to explain the detailed working of the programme here any further, as the above explanation is a simplification, but for a good overview please refer to (Woelfel & Stoyanoff 1993)). Among others, Gretzel and Fesenmaier (2003), Ryan (2000) and Schmidt (2001) have advocated CATPAC to be a valuable tool for content analysis. To obtain the results described underneath, 5 documents were content analysed by CATPAC, one for each sector of the industry and one for the total population. Those words appearing with a minimum frequency, covering at least 2.5% of the analysed content, were included in the results (ranging from 24 to 28 unique words, depending on the specific content of the text being reviewed). To determine patterns of similarity and central concepts, several hierarchical cluster analysis methods were applied to the proximity table produced by CATPAC in order to test coherence of the several clustering solutions. As a result the name 'Dubai' was excluded from analysis as this was obviously the most central word in all texts (representing 11.9% of all words included in the analysis of the total text, compared to the second most frequent word representing 3.7%). As Dubai correlated with almost every other concept in the text, it distorted the cluster analysis. Since it is quite obvious that the analysis relates to destination Dubai, there seamed to be no harm in excluding this word from the procedure, allowing better clustering results on the rest of the data. The outcomes reported underneath are based on Ward's method.

3.4 Results

The content analysis of pictures and text was conducted separately. Nevertheless results were strikingly similar. First the rest of this chapter will report on the results of the content analysis of the pictures, followed by the results of the CATPAC analysis of the text, after which the conclusion will pull observations together.

3.4.1 Pictures

Table 3-3 lists the results of the content analysis according to motifs, arrangement and contextualisation. Motifs are clustered together with other motives with which they seem to often appear together (see Figure 3-10). The most frequent appearing motif is "dining", followed by "airport facilities". The most frequently appearing context is that of a desert setting. Tourists appear in 24% of the images, which suggested that in general terms the experiential nature of tourism is not often reflected in the projected imagery.

Table 3-3: Content analysis results (n=505)

Motif	*Frequency* *% of images in which motif appears*	*Arrangement* *Average no. of motifs in images that include this motif*	*Contextualisation* *Context in which cluster of motifs often appears*	*% of Images in which context appears*
Dining (restaurant, bar, disco)	12.5%	1.14		
Airport facilities	10.3%	1.52		
Staff	4.6%	2.22		
Modern shops/shopping malls	4.6%	1.73		
Spa facilities	2.6%	1.23		
Old fort	1.6%	1.25		
Four wheel drive	9.1%	1.67	Mountains	3.2%
Local Emirati men	8.3%	2.45	Desert	16.0%
Camp/picnic area	5.0%	2.24		
Camels	4.2%	2.57		
Sunset	1.6%	2.38		
Artefacts (e.g. Arabic coffee pots, jewellery, jugs)	1.6%	2.13		
Falcon	1.2%	2.50		
Mosque	1.0%	2.80		
Belly dancer	1.4%	3.57		
Henna body painting	1.2%	3.17		
Local Emirati girls/women	1.4%	1.43		
Skyline	8.7%	1.59		
Traditional Dhow boat	4.8%	2.20	Creek	9.1%
Traditional architecture (e.g. Barasti houses, museum, wind towers, old Arabic doors)	4.8%	1.70		
Hotel exterior	7.3%	1.76		
Palm trees	6.7%	2.62		
Water sport	5.5%	1.71	Sea	8.1%
Swimming pool	3.6%	2.44		
Beach	3.6%	2.39		
Gardens	2.0%	2.80		
Hotel interior (non F&B, i.e. rooms/lobby)	3.8%	1.11		
Golf	3.6%	1.78		
Golf club	1.8%	2.56		
Souk	2.8%	1.57		
Horse races	2.6%	1.15		
Meeting, incentive, conference, exhibition facilities	2.0%	1.20		
Sport	1.6%	1.63		
Wildlife	1.4%	1.43		
Limousine	1.2%	2.00		
Monuments	0.8%	2.25		

Someone who is unaware of the fact that Table 3-3 refers to Dubai, could read it as follows. It refers to an Arabic and Islamic country: mosques, palm trees, camels, dhows. In origin it concerns a nomadic culture: monuments represent only 0.8% of images. The culture sustains a masculine order: pictures that include men (8.3%), falconering, four wheel drive vehicles, and belly dancers. And finally, a touristic infrastructure has been put in place aimed at entertainment and leisure: the majority of pictures contain references to this. Hence Dubai seems to present its modern facilities, but does not distinguish its own unique identity. Table 3-3 could refer to many other destinations in the region. Dubai appears to be attracting tourists for its facilities and not based on a unique local or national identity.

Figure 3-10 shows the clustering of motifs and contexts using bivariate correlations as well as our own interpretation. There seem to be eight logical focal themes, which can then each be split into experiential or non-experiential themes depending on the presence or absence of tourists in the images.

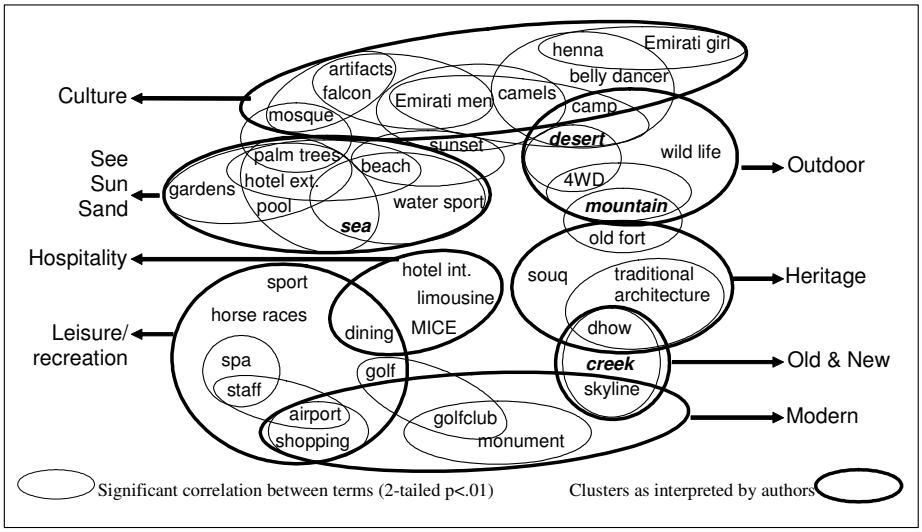


Figure 3-10: Focal themes of images through clustering of motifs
(italic items are contexts)

Table 3-4 lists the 14 focal themes (the themes of 'hospitality' and 'old and new' had no experiential dimension), their frequency and significant differences in distribution across sectors of the industry. Only 'cultural experience' was not significant at all and 'reflections of old and new' and 'heritage experience' were only significant at 10%. As earlier suspected only 26% of images is experiential in nature. Most frequent focal themes are 'reflections of modern Dubai', 'hospitality facilities', 'leisure/recreational facilities and activities', 'reflections of culture' and 'outdoor activities', together making up almost two thirds of the total number of images. That suggests that what is projected is very much facility/activity based. This is particularly true for the hospitality and transport sectors, although they also have many experience based images, these images show tourists

making use of the leisure/recreational facilities and modern airport facilities respectively. In fact, the hospitality and transport sectors had no images related to heritage, the outdoors or contrasts of old and new Dubai whatsoever, and very few cultural images.

Table 3-4: Focal themes and differences between tourism sectors in Dubai (n=505)

Focal theme	*Freq.* N=505	*Hospitality* N=99	*Tour operators* N=302	*DMO* N=48	*Air transport* N=56	*F*	*p*
Leisure/recreational facilities & act.	11.7%	10.1% [a]	10.6% [a]	8.3% [a]	**23.2%** [b]	**2.8**	**0.040**
Experience modern Dubai	3.8%	2.0% [a]	0.3% [a]	0.0% [a]	**28.6%** [b]	**45.3**	**0.000**
Reflection modern Dubai	17.4%	7.1% [a]	16.2% [b]	**20.8%** [c]	**39.3%** [d]	**9.3**	**0.000**
See, sun, sand experience	3.4%	2.0% [a]	3.3% [a]	**10.4%** [b]	0.0% [a]	**3.3**	**0.020**
Reflections of heritage	9.1%	0.0% [a]	**10.9%** [b]	**27.1%** [c]	0.0% [a]	**12.6**	**0.000**
Reflections of culture	11.5%	1.0% [a]	**15.2%** [c]	**16.7%** [d]	5.4% [b]	**6.2**	**0.000**
Outdoor activities	10.1%	0.0% [a]	**14.9%** [b]	**12.5%** [b]	0.0% [a]	**8.8**	**0.000**
Outdoor experience	4.2%	0.0% [a]	**6.6%** [b]	2.1% [a]	0.0% [a]	**4.0**	**0.008**
Reflections of old and new	2.2%	0.0% [a]	**3.6%** [b]	0.0% [a]	0.0% [a]	**2.5**	**0.056**
Heritage experience	2.0%	0.0% [a]	**3.3%** [b]	0.0% [a]	0.0% [a]	**2.3**	**0.077**
Hospitality facilities	13.1%	**35.4%** [b]	8.9% [a]	4.2% [a]	3.6% [a]	**20.7**	**0.000**
Leisure/recreational experience	9.1%	**30.3%** [b]	4.3% [a]	4.2% [a]	1.8% [a]	**25.6**	**0.000**
See, sun, sand facilities & activities	8.5%	**19.2%** [b]	7.6% [a]	2.1% [a]	0.0% [a]	**7.8**	**0.000**
Cultural experience	3.8%	1.0%	4.6%	2.1%	5.4%	1.2	0.326
Reflection of Dubai	40.2%	8.1%	46.0%	64.6%	44.6%		
Facility and activity based	43.4%	64.6%	42.1%	27.1%	26.8%		
Experience based	26.1%	35.4%	22.5%	18.8%	35.7%		

Note: Rows that contain significant variance between groups according to ANOVA's F-test are indicated in bold. In those cases, means with a different superscripted letter ([a, b, c, d]) are significantly different at the .05 level according to Duncan's post hoc test, while the letters indicate a within-row ranking ([a] are groups with the lowest means, [d] are groups with the highest means).

The promotion of the rich culture, heritage and identity of Dubai is therefore clearly left to the DMO and to some extent the tour operators. In it (see the Culture cluster in Figure 3-10) we can recognise some of Hall's (1996: p. 627) elements of national identity, such as the emphasis on origins, continuity, tradition and timelessness (henna painting, falconry); the foundational myth (camels and camps in the desert); and the idea of a pure, original people or "folk" (The Emirati men and women as depicted in these images), but also the invention of tradition (belly dancers) (See Figure 3-11) . The fifth of Hall's elements, the narrative of the nation can partly be fount in the focal theme 'Heritage'.

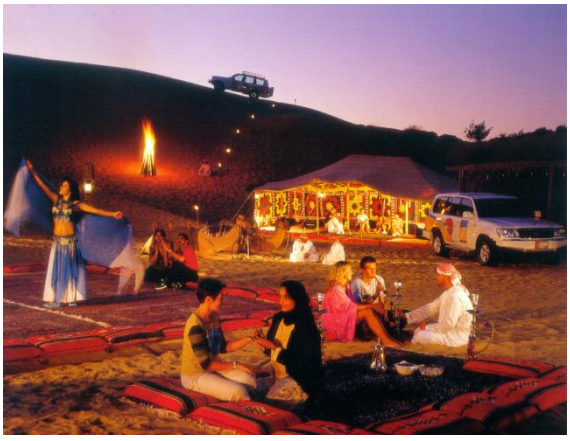


Figure 3-11: Cultural outdoor experience

Tour operators, although involved in cultural activities and the only ones projecting some heritage experiences, are primarily involved in outdoor activities, which represent mostly what is called wadi- and dune-bashing (the idea of taking a four wheel drive car to its limits in small river beds in the mountains or on sand dunes). Lastly when performing analysis of variance between private, semi-government and government organisations, there also proved to be a significant difference in the projection of the 'reflections of heritage' theme (F=12.3, p=.000). This focal theme was present in 27% of the imagery used by government, compared to 9% and 4% for private and semi-government organisations respectively.

3.4.2 Text

Table 3-5: Frequency list of unique words in all text

Word	Freq.	%
Desert	298	6.4
International	290	6.2
Hotel	280	6.0
City	232	5.0
World	229	4.9
Arabian	222	4.8
Golf	219	4.7
Available	192	4.1
Facilities	178	3.8
Club	176	3.8
Jumeirah	174	3.7
Guests	172	3.7
Experience	166	3.6
Emirates	162	3.5
Day	155	3.3
Beach	153	3.3
Tour	151	3.2
Shopping	147	3.2
Water	146	3.1
Enjoy	143	3.1
Traditional	142	3.0
Group	137	2.9
Resort	131	2.8
Offers	130	2.8
Centre	120	2.6
Service	116	2.5

Table 3-5 displays the frequency list of unique words in the total text covering all websites. Based on the cluster analysis using the CATPAC proximity table, only four small clusters were identified: Arabian Desert Experience; Jumeirah International World(class); Hotel Facilities; Golf Club; and Shopping Centre. The other 14 most frequently found words, could not clearly be clustered, probably because they were used in different contexts, in different parts of the text, coming form different types of sector-specific websites. This assumption is quite plausible as analysis of the website texts per sector resulted in the identification of clear central concepts within each of the four documents, but different ones for different sectors (see Table 3-6). The most commonly used word in all the text is not-surprisingly the word 'desert', which is also part of one of the most important central concepts, the Arabian Desert Experience. Although this can be interpreted as a reference to Hall's (1996: p. 627) "foundational myth", it is at the same time the *only* central concept in the overall analysis that initially can be linked to Hall's five elements of identity (two more can be found in Table 3-6 as being projected by the tourist board: the narrative of the nation of life in Dubai and the Arab origins). Another important central concept in the complete text, is the combination of Jumeirah's International World (class) Hotel Facilities (Jumeirah is the geographical area of Dubai where most of the resort hotels are situated). Of greater interest though are the differences in website content between the various tourism sectors. This is shown in Table 3-6.

In line with the results from the content analysis of images on these same websites, it can be observed that the promotion of the rich culture, heritage and identity of Dubai is clearly left to the DMO and to some extent the tour operators. The latter, although involved in cultural activities and the only ones projecting some heritage experiences, are primarily involved in outdoor activities and incentives. The transport and hospitality websites

primarily focus on facilities and activities. Although it is positive to observe that the hotels also refer to guest experiences, this refers particularly to dining experiences (See Figure 3-12).

Table 3-6: Central concepts of website content for various tourism sectors
(*italics text* is added by the researchers for clarity of reading)

Sector	*Central Concepts*	*Related words*
Transport (5,398 words)	The Airport	International airport *with* special *facilities* available *in 3* terminals
	Infrastructure	Gate(s) & business lounges
	Facilities	Duty free facilities & services located *in* concourse
	VIP facilities	Car *(parking & limo service) at an X-amount of* DHS *(local currency) cost per* day, *first*-class lounge & *hotel* rooms & *(business & medical)* centre
Tourist Board (16,709 words)	Purpose	*With chairman* Sheikh Maktoum *promote* international tourism *for the* city *of Dubai*
	Heritage	Traditional life *around the* desert *and the* creek
	Modern Dubai	World-*class* modern shopping centres for visitors
	Cultural origin	Middle East, Arabian Gulf, United Arab Emirates
	Facilities	Golf club *and* available *tourist* facilities
	Outdoor	Bird species and water
Hospitality (28,143 words)	Properties 1	Jebel Ali golf resort, shooting *club* & spa
	Properties 2	Jumeirah International hotels & beach club *have* world-*class* facilities available *to* guests
	Dining	Experience & enjoy dining *in the* bars & restaurants located *close to the* rooms *or otherwise open for* day *visitors*
	Health club	Body & skin treatment
Tour Operators (42,235 words)	Sightsee tour	Experience city tour: shopping, camels & the desert
	Incentives	World-*class* hotels & traditional Arabian adventures for groups *and your* guests
	Desert safari	Enjoy sand dunes drive & Arabic dinner at night
	Other activities	International golf club and water *sports,* tours and services *in the* Emirates

What is striking is that although there is limited reference to the experiential nature of tourism; no multisensory references, based on what we would (expect to) taste, hear, smell, see or feel when consuming these experiential products, are found in the texts. The words 'water' 'desert' and 'enjoy' probably come closest. It must be noted in this respect that, of course, pictures used on websites are an important part of the online projected destination image; as visual cues. But even when taking into account the results of that part of the

Figure 3-12: Dining experience

study, there is a general lack of reference to other sensory cues and emotions. They say that 'one picture is worth a thousand words', but a picture and description of a hotel room, restaurant or airport gate for instance, is not going to tell us much about the actual tourism experience that one can expect at that particular unique destination, in terms of all the multisensory emotions that will be generated.

3.5 Conclusion

Based on the research background description that was provided in the first half of this chapter, we can draw some preliminary conclusions on some of the elements of the development strategy and identity of Dubai. First, the narrative of the nation seems to evolve around the history of the Bani Yas tribe of the UAE and the part of the Al Bu Falasah subsection that has been ruling Dubai since 1833 – the Al Maktoum family. The foundational myth seems to incorporate two elements: Bedouin life in the desert on the one hand; and pearling, the building of *dhows* and trading which centred around the Creek on the other. The latter has been en element that has had a dominant influence on the character of Dubai, as it splits the city in half. Some even suggest that the creek is responsible for giving Dubai its name. An important socio-cultural tradition is found in Arab hospitality in general and in particular in the role of the *majlis*, as a place where men meet and discuss politics and decide on future directions, even today. Other traditions often referred to and still practiced today are falconering, calligraphy, poetry, song writing (language) and dancing along with the traditional *liwa* bands by men and henna body painting and the use of perfume and incense burning by women. One of the most important artefacts that gave Dubai its historical architectural character is the *baadgeer*, the windtower that dominates rooftop views over historic parts of the city. Invented traditions include the public celebrations now held during *Eid* holidays, national day and festivals and events in the restored historical quarters of the heritage village around H.H. Sheikh Saeed's House and the Bastaqya. These point towards an emergent authenticity of people co-creating things that matter to them, as many among the local population participate in such events. As far as this original population of Dubai - the Emirati people - is concerned, their identity is largely determined by their religion, their position in the Middle East and their traditional dress still worn today. But at the same time it is these elements that also determine the myopic view that the West holds of the region according to Said (1981). It would be of interest to identify to what extent this assumed stereotyping does indeed dominate or if more nuanced images exist. The analysis of projected and perceived images that follows should generate some interesting insights.

A-priori, other invented traditions like belly dancing and the tremendous investments in iconic tourist facilities, appear to fill a void left by colonialism, exerting cultural power and thereby reconstructing the people of Dubai and its locality. The growth in tourism and trade has led to a tremendous import of foreign labour, as well as technology. In a very short period of time, the local population has been rapidly forced to deal with elements of modernity while maintaining traditions. The adoption of mobile technology and instant messaging proves to be an interesting case in point. Other issues that economic growth, internationalisation and tourism have brought along, are concerned with the economic and employment positions of the local Emirati. Also, more specifically related to tourism, prostitution, the availability of alcohol and imbalances in cultural norms between hosts and

guests might become issues in future. Up to now, as far as the social fabric of the Emirati society is concerned, there do not seem to be any significant tensions, but, of course, if there were, it would be hard to identify them through the secondary sources that we used for our analysis. The success factors that have led to the tremendous progress of Dubai according to literature, include: the entrepreneurial vision of the ruling family as risk-takers themselves; easy access to decision-makers through a short chain of command, limiting bureaucracy; the integrated nature of development; the use of public private partnerships; the application of the best international standards; a focus on iconic projects; the availability of a steady stream of investors; and allowing for progress without social and cultural upsets, where the business culture is still founded on trust as opposed to contractual agreements. However, although these are recurring arguments, both in literature as well as in our communications with senior officials in Dubai, they appear to be particularly relevant within the context of global flows. The question is how these success factors and current developments are perceived within local context, by disempowered local groups among the resident population. Unfortunately, this perspective was not included as part of our research project, although it is an interesting focal area within the destination image formation model, which deserves attention in future research. The work of Van Keken and Go (2003; 2004) is of interest here. Nevertheless, although accepting these limitations, combining the above observations all together, it seems that the identity of Dubai could be summarised as being a global business and tourism hub with respect for tradition, heritage and local culture.

When analysing the projected identity through content analysis of websites in the second half of this chapter, we found that the representation of the identity of place, its culture and heritage is left to government, the DMO and, in part, tour operators. The vast majority of the unique elements of Dubai's identity are presented, but infrequently and mostly by the DMO. Although the government is trying to react to recent geopolitical events with projects and campaigns which are meant to illustrate the rich heritage of Dubai, private sectors, and particularly the hospitality and transport sectors, seem to avoid references to the local culture and heritage. As Fesenmaier and MacKay (1996: p. 42) argue: "destination promotions commonly include people as tourists. An absence of local peoples may suggest denial of their existence and removal of relationships between the visiting at [and, *sic*] local cultures". The findings here suggest that this might apply to some sectors of the industry. Therefore both private sector and public sector appear to be working across purposes. Especially in the case of the airport website this is peculiar as it is most heavily involved in the media campaigns promoting Dubai's heritage. But even when it comes to the way culture, heritage and identity are projected by the DMO, 'gaze' type images are the norm, as opposed to experiential representations. At the same time it will be difficulty for the airport and hospitality industry in Dubai to reflect identity as eighty percent of the population and most labour as well as management in the private sector consists of expatriates.

The results of this research clearly show that the way Dubai projects its imagery as a tourism destination lacks creativity and 'cross border' thinking between tourism sectors and therefore fails to coherently reflect its true cultural identity. Most of the projected imagery is fragmented in nature and product based, showing facilities and activities on offer. Those experiential type images that are found are those of fragmented experiences

that relate directly to the specific product offered by particular sectors (i.e. "dining experiences or "experience modern shopping facilities"). Therefore these experiential type images contribute largely to the commoditisation and consuming nature of tourism. The use of photography to design effective (holistic) tourism experiences, as suggested by Sternberg (1997) and Garlick (2002), seems to be very limited. The experiential nature of the "consumption of place" is almost completely unrecognisable when one tries to interpret what is projected by tourism websites.

Hirschman and Holbrook (1982: p. 92) emphasise the importance of multisensory, fantasy and emotive aspects of experiential or hedonic products such as tourism. Yet, the way the tourism industry projects images of its tourism product offering, such as for instance on destination marketing websites (Gretzel & Fesenmaier 2003), is still:

> Focusing on communicating lists comprised of functional attributes such as price, distances and room availability. The design is based on a model of a rational and information seeking consumer which often results in simple activity based descriptions that reflect the supply side…rather that an actual consumer's perceptions of tourism experiences. It is argued that this lack of an experiential mindset within the tourism industry is due largely to a lack of understanding of the nature of tourism experiences (Gretzel & Fesenmaier 2003: p. 50).

Gretzel and Fesenmaier's conclusion is supported by the research findings presented in this chapter. One of the key tourism challenges seems to be that the focus of private industry decision-makers is on maintaining tourist satisfaction levels and yield in their own very specific sub-domain. The part of the image of the world that they perceive, is often only related to the specific facilities and convenient commodities that they offer for consumption. Put differently, the private sector makes little or no effort to project tourism experiences that are embedded in a local context. They seem neither concerned with the destination's identity nor how it should be projected. Therefore, they often fail to incorporate the full potential of the prospective rich tourism experience that would match the tourists' perceived destination image and the experience delivery which the tourists expect.

Gretzel and Fesenmaier (2003) showed that sensory information regarding consumer perceptions of places can be researched and bundled into sensory themes following specific patterns of association, which "can be used to define coherent experiences sought after by certain groups of travellers". Adding such vividness (Hoffman & Novak 1996; Shih 1998) would help to create telepresence, which would facilitate the consumer to experience place without having to fill in too many blanks. This proves that there is a world of opportunities for the tourism industry to use the learning of the hedonic consumption domain to bridge the tourism delivery and supply gap between tourism development strategy and tourist demands specifications, i.e. the way that the destination's identity is reflected in the tourism product offering and the way it is communicated, in order to provide the rich tourism experience that the tourist is looking for, based on a shared cultural identity that has been projected by the destination (amongst others through the media, websites, art and literature, historical narratives and prior experience with a culture, other than one's own). Of course, with the current state of technology, it is still not

easy to incorporate real stimulation of all the senses; touching and smelling are the least advanced elements of virtual reality and even sounds are often left out. But even just through well written text with clever references to the senses, the experiential nature of what is projected can be advanced. An example of this will be presented in the next chapter.

To do everything possible to create the right expectations through a strong projected image is crucial. If tourism destination management organisations fail to develop a design, which is capable of dealing with local identity and the emerging transnational mediascapes, ethnoscapes and technoscapes, simultaneously, it risks a high probability of 'unbalanced' host-guest encounters. Consequently, tourists are likely to adjust their perceived destination image and even lower their expectations, based on their actual tourist experience. But what may be worse, at least from a tourist destination perspective, is that they are likely to misinterpret and share perceptual inferences with other strangers, thereby creating a self-perpetuating spiral of misrepresentation in the image formation process. Therefore, it is crucial that both the design of a shared cultural identity and the construction of tourist scripts are rooted in a sense of place. Ultimately, the quality of a tourist experience and sustainable host community development, depends on the intelligent alignment of the perceived destination image and projected identity. The perceived image will be the area of research covered in the next chapter.

4 EMPIRICAL ANALYSIS: PERCEIVED DESTINATION IMAGE

> *Our image of the world is not uniformly certain, uniformly probable, or uniformly clear. Messages, therefore, may have the effect not only of adding to or of reorganising the image. They may also have the effect of clarifying it, that is, of making something which previously was regarded as less certain more certain, or something which was previously seen in a vague way, clearer. Messages may also have the contrary effect. They may introduce doubt or uncertainty into the image* (Boulding 1956: p. 10).

This chapter reports on two studies that were conducted in order to measure perceived tourism destination image. The first study deployed a traditional multi-attribute approach which proved to generate unsatisfactory results. As a consequence, a second study was undertaken, using a completely different, qualitative phenomenographic approach. The results are reported underneath.

4.1 The Inadequacy of Prevailing Destination Image Measurement

As has been discussed in great detail in chapters 1 and 2, a strong destination image means perceived superior customer value and consequently positively influences buying behaviour (Tapachai & Waryszak 2000). Therefore, we wanted to identify if, regardless of the destination's unique features and tourists holistic 'feelings', the common attribute-based approach would be able to measure the effectiveness of marketing efforts aimed at (re)positioning a destination's image among different groups with different levels of product familiarity. If that were to be the case, the problem of measuring consumer evaluations of tourism destination images, be it online or offline, would be fairly limited. Therefore, arising from this discussion, the following theoretical assumptions needed to be confirmed:

- Traditional quantitative attribute based destination image research can be used to identify content of perceived images and subsequently determine effectiveness of tourism destination marketing;
- It is possible to rate virtual and physical tourism destinations based on attribute based research;
- Alternative methodologies to measure consumer evaluations can be identified.

4.1.1 Research Background

An empirical study was conducted for the Dutch domestic tourism organisation (DTO), the Dutch Foundation on Tourism and Recreation AVN (in short AVN). The foundation is a co-operation between the Dutch Automobile Association (ANWB), the Netherlands Bureau for Tourism (NBT) which is the Dutch national tourism organisation, and the Tourist Information Offices (VVV's). The AVN is concerned with the sustainable development of domestic tourism and recreation in the Netherlands. It performs many

activities, such as trade fairs, consumer shows, direct mailings of brochures, distribution of travel guides, familiarisation trips, and enhancement of media exposure. In order to practise marketing in a responsible manner, AVN decided to measure, on a regular basis, the effectiveness of its marketing efforts. Such a marketing effectiveness monitor would offer two important benefits:

1. It provides stakeholders a reasonable degree of 'transparency' in the marketing affairs of the AVN and therefore may pre-empt many time-consuming enquiries from its stakeholders;
2. It provides a 'success indicator', which enables AVN to measure, to what extent their efforts gain results through changing the destination's image.

4.1.2 Survey Methodology

Carman (1990) suggests that consumer expectations change with the extent to which consumers are familiar with the service rendered, therefore the AVN's total target group, which is the national public, was divided into the following four groups, based on awareness and patronage levels as indicated in the AIDA-model (creating Awareness, Interest, Desire and Action) (Ster & Wissen 1987):

Group 1: Those consumers that have no experience with and are not familiar with the Netherlands as a holiday destination;
Group 2: Those who are aware, but show no interest in the Netherlands as a holiday destination;
Group 3: Those who show interest, but do not take part in any activities;
Group 4: Those who do take part in activities in the Netherlands.

As stated earlier, attribute scores and therefore perceptions of the domestic tourist destination image were obviously expected to differ between these four groups.

Attributes were identified in a management session through a Bernstein (1984) discussion (such as suggested by Van Riel (1996: p. 63)). AVN management participants were asked to mention those attributes of the "tourism and recreation in the Netherlands"-product that play an important role in determining the organisation's communication activities. In a subsequent discussion, the total number of attributes was reduced to eight essential values, which all participants considered to be important and are believed to contribute to the identity of the Netherlands as a holiday destination for the various AVN target groups. In destination image measurement literature, it is not uncommon to have such unstructured approaches of in-depth interviews or focus groups with industry professionals, in order to identify image attributes (Gallarza et al. 2002). Alternatively, consumers themselves could be asked to identify attributes through unstructured approaches first, before applying the quantitative approaches using scales. A third option, sometimes applied in literature, is to perform a review of promotional material from the tourist destination being studied, in order to identify the relevant attributes (Beerli & Martín 2004b: p. 624). The latter two approaches were not considered here, assuming that AVN management, as heavily involved professionals, would, as a team, be able to predict the potential outcomes of the other approaches.

Table 4-1: Destination image attributes

Common destination image attributes (Echtner & Ritchie 1993, pp.3-13)	**Destination choice attributes, based on tourists' perceptions of European countries (Haahti & Yavas 1983, pp. 34-42)**	**The Netherlands' strengths, based on NBT's destination image research (Stichting Toerisme & Recreatie AVN 1995: p. 14)**	**Image attributes identified through this study's Bernstein-discussion**	**Compared with the most commonly used attributes as listed in Table 4-2.**
	Accessibility	Close by	Good accessibility	Accessibility Transportation
Interest/adventure	Entertainment and night life Facilities for sports	Variation in a small area Biking/water sports	Variation in activities	Various activities Nightlife & Entertainment Shopping facilities Sports facilities Relaxation vs. Massific
Natural state	A peaceful and quiet holiday	Water/dunes/polder	Variation in scenery	Landscape, surroundings Nature Originality
Inexpensiveness	Good value for money	Inexpensive	Possibilities for any budget range	Price, value, cost
Tourist facilitation		Easy to organise	Well organised	Information available Accommodation
Resort atmosphere/ climate			Opportunities in all seasons	Climate
Cultural distance Lack of language barrier	Cultural experience	Familiar	Familiar	Cultural attractions Gastronomy Safety Social interaction Residents receptiveness
Comfort/security	Friendly and hospitable people	Easy to get information	High service standard	Service Quality

Table 4-1 lists the attributes identified in the fourth column along with results from other studies consulted at the time the methodology was formulated (first three columns). It shows that scales are comparable and literature agrees, particularly with Echtner and Ritchie's (1993) destination image measurement scale, which was discussed earlier, but also with other studies if compared with Table 4-2 (matched with Table 4-1 in the last column, as identified at the time this dissertation was written). The attributes identified were used as a basis for the AVN marketing effectiveness monitor, which would potentially be integrated into a longitudinal research panel, called CVO, the Dutch Continuous Holiday Research panel. Prior however, two surveys were conducted as a reliability/validity test and reference (t_0) measurement, identifying attribute scores as a base reference for indexing future destination image perceptions among the four AIDA target groups (different groups with different levels of product awareness and patronage as described above). The way the sampling was conducted for these two surveys is depicted in Figure 4-1.

As one of the objectives of the monitor for AVN was to provide a 'success indicator', enabling AVN to measure to what extent their efforts gained results through changing the destination's image, it was essential for the population sample to include a sufficient

number of respondents with a minimum level of awareness concerning AVN's activities, in order to be able to attribute perceptual changes to AVN's efforts. With AVN's customer database readily available, it was therefore a logical choice to use this as the sampling frame for quota sampling AIDA-groups 2, 3 and 4 for the monitor pre-test measurement. For detailed reference, the responses are listed per sampling frame in Table 4-3.

Table 4-2: The most common attributes used in tourism destination image studies

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

Note. Table and listed reference from "Destination Image: Towards a Conceptual Framework", by Gallarza, M.G., I. Gil Saura, & H. Calderon Garcia, 2002, *Annals of Tourism Research*, 29 (1), p. 56-78, Reprinted with permission from Elsevier.

Furthermore for the first survey, additional respondents in group 2 and all those in group 1 were selected through another quota sample, identifying non-domestic travellers over the

telephone using automated random calling through the national telephone directory CD-ROM, until a total number of 300 responses were collected. Because of results obtained from this latter sample, however, it was later decided to proceed with the second survey using a national representative sample across all AIDA groups. The first survey showed that even among those respondents that did not enjoy more than one domestic holiday during the last three years, more than 25% was aware of AVN and even interested or participating in its activities. Assuming that such a level of awareness could be extrapolated to the whole population and would probably be even higher among AIDA-groups 3 and 4, national representative samples were proven to be a feasible means to fulfil all research objectives. For the second survey therefore, sampling decisions were made accordingly.

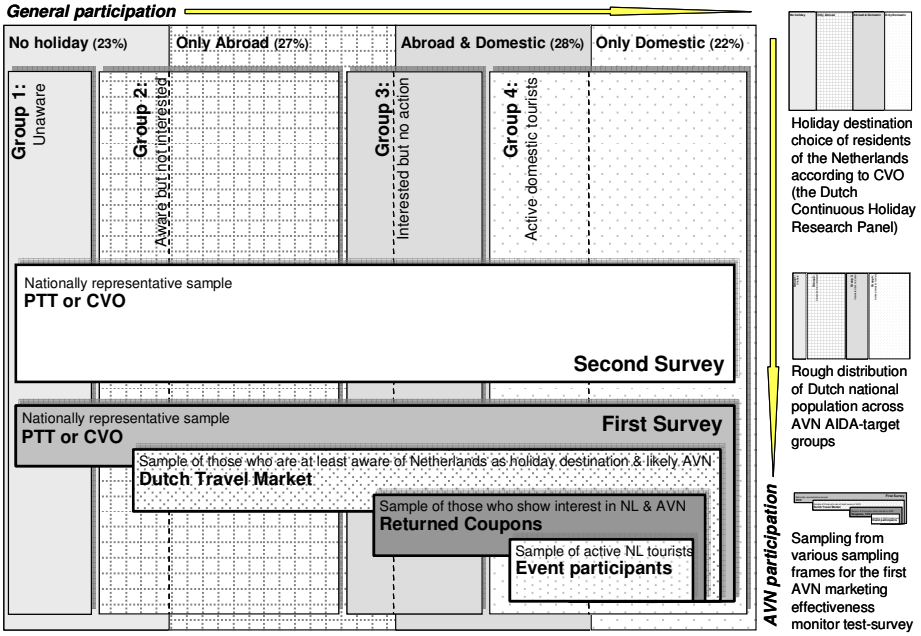


Figure 4-1: Survey sample designs and travel behaviour, awareness and patronage

Table 4-3: Sampling frames for first measurement

Sampling frame	*Sample*	*Response*
Addresses from returned coupons in the cycling magazine	200	75
Addresses from returned coupons in a special issue on recreational cycling	200	85
Addresses from returned coupons in the cultural magazine	200	93
Addresses from returned coupons in the hiking magazine	200	81
Two address directories of participants of the annual national cycling event	400	142
Total (response rate = 40%)	1200	476

In the first measurement (using the different sampling frames to identify different target groups), the results showed significant differences in destination image between frequent

domestic travellers and Dutch tourists that never patronise their own country (for specific details see (Govers & Go 1999)). However, the second survey, using the nationally representative sample, completely failed to identify such differences. The latter results remained unpublished thus far and are discussed in more detail below.

4.1.3 Data Collection

A total of 510 respondents were interviewed over the telephone, targeting a national representative stratified random sample using automated random calling through the national telephone directory CD-ROM. The sample was controlled for geographical spread, matching the population distribution in the country. 57,6 % of respondents were women. Principal component analysis with varimax rotation was performed on 32 items for the total sample of both two measurements, as depicted in Table 4-4.

Table 4-4: Results of factor analysis on 32 items measuring destination image

Items	Factor Lading	Factor Name	Eigen-value	% var. exp. (cumulative)	Cronbach Alpha
Places of interest and historic sites	.68				
Tourist and recreational attractions/events	.45	Variation in			.68
Entertainment and nightlife		activities			
Cycling, hiking and water sports	.65		9.19	32.8 %	
Natural beauty and countryside	.70			(32.8 %)	
Accommodation in variety of nice settings	.47	And			.76
Urban beauty	.61	Scenery			
Variety, both countryside as well as cities	.74				
Opportunities for any budget	.84	Possibilities			
Opportunities in adequate price brackets	.80	for	1.42	5.05 %	.88
Entertainment to suit everybody's purse	.87	any		(37.9 %)	
Also with little money it can be pleasant	.75	budget			
Safe	.74				
Familiar	.68	Familiar	1.02	3.63 %	.71
Cosy	.48			(41.5 %)	
Nice holiday atmosphere	.47				
Range of accommodation and packages	.42				
Information accessibility	.68	Well			.66
Organisational capabilities	.47	organised			
Info and help from org's such as VVV	.56		2.38	8.5 %	
Service and quality	.55			(50.0 %)	
Standards of facilities	.54	High services			
Satisfying customer needs	.56	standard			.74
Customer concern, e.g. child friendliness	.54				
For any season	.70	Opportunities			
Opportunities despite the climate	.54	in	1.16	4.15 %	.77
Bad weather facilities	.56	all		(54.2 %)	
Also in fall and winter enough to offer	.68	Seasons			
Itineraries					
Accessibility of tourism destinations		Good			.63
Signposting		accessibility			
Easy to reach destination					

Although some factors were combined in the factor analysis, they were retained as separate factors in the analysis because of their satisfactory Cronbach Alpha's (over 0.65). The

accessibility attribute was not included in the factor analysis as two out of four items were changed as a consequence of unsatisfactory results in the first survey. Although Cronbach Alpha for this factor still raises concern, it was increased from only .56 in the first survey. Only the "entertainment and nightlife" item had to be removed because of unsatisfactory results. In the subsequent analysis each respondent's score on the eight image attributes was calculated by the geometric average of the corresponding four items for each attribute.

4.1.4 Results

Figure 4-2 portrays the image attribute scores for the four AIDA groups earlier identified. Analysis of variance only shows significant differences in scores for the 'opportunities in all seasons' attribute. Apparently those people that are aware but show no interest in the Netherlands as a possible tourism destination, view the weather conditions as one of the main prohibiting factors for domestic tourism. Surprisingly however, all other attributes show no significant differences between different groups of consumers with different levels of awareness and patronage. Even an overall average 'school mark' on a 1-to-10 scale does not significantly differ between groups.

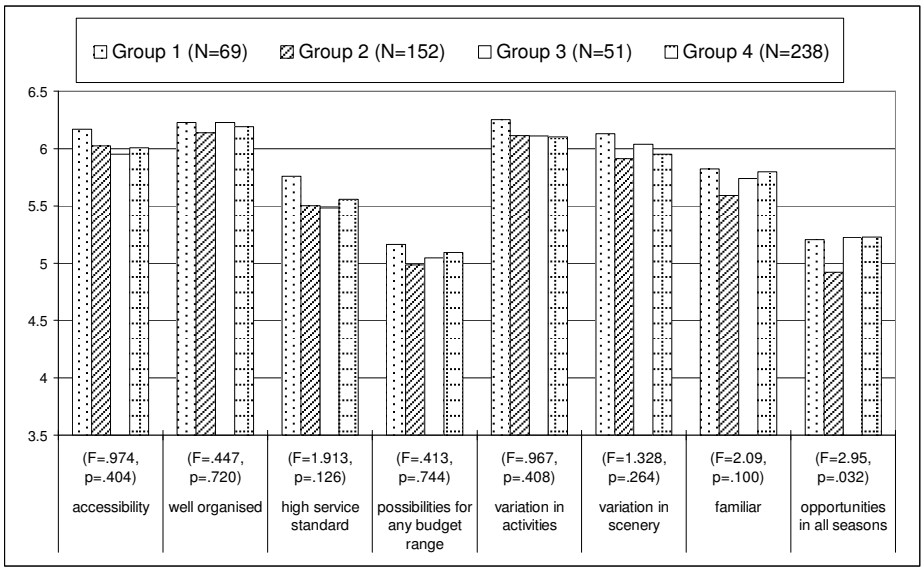


Figure 4-2: Destination image among 4 different awareness and patronage groups

In another effort to identify destination image differences, two groups of tourists were formed: one group of domestic tourists, who did not go abroad for the last three years, but went on holiday in the Netherlands more than twice; and a group of international tourists with reverse characteristics. However, t-tests between the two groups provided the same results, no differences besides the 'weather attribute'. In a final attempt, cluster analysis was used to create three groups of respondents with relatively high, medium and low scores on all attributes, i.e. groups with a strong, weak and intermediate image of the

Netherlands as a tourism destination. Again however, contrary to what was expected, no differences in socio-demographic characteristics or leisure travel behaviour were identified.

Unfortunately we were deceived by the first survey in observing expected differences between the four AIDA groups. In fact, the findings of the second survey prompted us to take another closer look at the results of the first survey. This showed that the observed differences between the AIDA groups was primarily attributable to variations in perceptions between those respondents who are not interested in the Netherlands as a tourist destination (either aware of it or not, i.e. groups 1 and 2 combined) and those who are interested, frequent domestic travellers, and those who are interested but not active (groups 3 and 4). Retrospectively, these first survey findings could be rationalised in two ways:

- The use of two different contact methods for collecting the data in the first survey: respondents selected from the AVN customer database, mostly those in groups 3 and 4, received the questionnaire through the post using the AVN direct mail system, while all other respondents, mostly in groups 1 and 2, were contacted by phone;
- Sampling frame bias: as illustrated in Figure 4-1, the respondents in the various AIDA groups in the first survey were selected from different sampling frames with customer contact data originating from different sources. Earlier assumptions that these consumers would be representative for the rest of the population of "domestics travel enthusiasts" (groups 3 and 4) would have to be rejected and, on the contrary, concluded that the sampling frames contained particular groups of consumers (e.g. "domestic hiking and biking trips enthusiasts") with their own distinctive domestic destination image perceptions.

This was supported by an analysis of variance of the total sample (first and second survey together), which clearly showed that differences in destination image perception were primarily to be attributed to sampling frame membership (and related variation in contact method) as opposed to most other respondent characteristics (neither in terms of demographics, nor in leisure travel behaviour or AIDA group membership). This showed that the first survey was flawed and that the results of the second, nationally representative survey, were to be regarded as the true measurement of destination image perception across the population, as defined in this research study.

Consequently, what is apparent is that the theoretical assumptions posed earlier do not hold, as the results of the second survey clearly show the inappropriateness of the measurement scale. Although there might be mediating variables involved, such as chauvinism, destination proximity or domestic versus international tourism, ultimately the scale proved to be incapable of identifying a relationship between consumer perception of destination image and destination choice behaviour.

4.1.5 Observations and Discussion

As mentioned earlier, it is widely agreed in literature that image influences buying behaviour, and therefore mediates marketing effectiveness (Echtner & Ritchie 1993; MacKay & Fesenmaier 2000; Padgett & Allen 1997; Sirgy & Su 2000; Tapachai &

Waryszak 2000). However, summarising the results of the above study, the 8-factor destination image measurement scale, that was developed based on literature review as well as an expert focus group, is incapable of identifying differences in perceptions between different groups with different levels of product awareness and patronage. Therefore these results reject the hypothesis and it has to be assumed that the traditional multi-attribute system is inadequate in measuring destination image.

It seems that because of the factor analysis applied in the multi-attribute approach, the resulting image characteristics lose their uniqueness, and are reduced to 'hygiene factors', or minimum requirements that tourism destinations need to fulfil. The subjective perspective of individuals seems to be lost. Any destination needs to provide a satisfying level of 'things to do', 'nice scenery', 'affordability' and 'tourist facilitation'. However, the interpretation of these aspects will differ largely between destinations and the type of tourists visiting them (attributes differ according to object (type of destination) and subject (consumer) as Gallarza, Gil and Calderón (2002: p. 62) put it). As discussed in chapter 2, the latter is also referred to in literature as 'self-focus', where the affective evaluations are not a description of the object, but of the relation between the consumer and the object (Leemans 1994). Sirgy and Su (2000) emphasise the importance of 'self congruity' it this context, which "involves a process of matching a tourist's self-concept to a destination visitor image".

Capturing nuances and self congruity can be very relevant. This can be illustrated by briefly returning to the context of Dubai, which is promoting itself as a tourist destination internationally, to consumers who are not familiar with Islamic societies, but at the same time to those who are. It would be of interest to identify the extent to which consumers are prejudiced based on prior information, for instance contained in travel guides, but also particularly in the news and cultural media, such as books, motion pictures or visits to museums elsewhere. For instance, the perception that Western consumers have of the Arabian Gulf, has obviously been affected by September 11, and for the first time in history the Internet had a major impact on this. It illustrates the increasing ephemerality of place images. As the events in New York and Washington unfolded people anywhere in the world, at a distance or close by, were able to read first-hand, up-to-date reports of what was happening. When the phone system collapsed, the Internet came through. 100 million US Internet users sent or received emails expressing concern after the attacks of September 11. Almost 23 percent received concerned emails from overseas (Lebo 2002). If people were unable to follow the course of events on television, they turned to the web. The number of visitors to Internet news sites soared tenfold after the attacks, reported Reuters. CNN.com said it was serving 9 million page views per hour after the attacks occurred, in comparison with its normal traffic of 11 million page views per day. A spokeswoman said it was the largest amount of traffic they had ever had (Reuters 2001).

All these unique and transient circumstances could be of great influence on destination image and therefore destination choice behaviour. As another example, a major cultural event in the Netherlands in remembrance of the painter Vermeer, attracted far more visitors from France than anticipated (100,000, compared to only 6,000 visiting a similar event in remembrance of Rembrandt (Vervoorn 2000)). This success in the French market was later attributed to the fact that Vermeer was part of the post-war French high school

curriculum, something not anticipated during the planning and operational stages of the event.

These examples emphasise the complex, relativistic (people have different perceptions) and dynamic (changing over time and geographical distance) (Gallarza et al. 2002: p. 69) nature of destination image and the fact that therefore it is very hard to measure, particularly when only using common multi-attribute quantitative measurement systems across destinations.

Based on the presented empirical and anecdotal evidence it needs to be contended that structured methodologies can be effective for measuring the common and attribute-based components of image, (but) are not useful for capturing the unique and holistic components (Echtner & Ritchie 1993: p. 5; Echtner & Ritchie 2003; Tapachai & Waryszak 2000: p. 37). As commonality of attributes across destinations and consumers is limited, research that does not incorporate uniqueness and holistic images is insufficient. Returning to Kierkegaard, the subjective truth of the individual seems to be more important than the objective common attributes.

As a result of the above findings, a constructivist approach was perceived to possibly be the right alternative (Ryan 2000). Or, in other words, we thought that a deconstructionist, post-modern approach, which includes "some kind of struggle with the *fact* of fragmentation, ephemerality, and chaotic flux"(Harvey 1989: p. 117), might lead to better fruition. Such as the radical changes created by business process re-engineering, the use of IT might also lead the way in deconstructing destination image, challenging the assumptions that have existed since long before, resulting in an emerging new information technology-based destination image measurement paradigm. The potential of combining the enabling capabilities of expanded computer processing power and Internet with methodologies of content analysis as applied in the research area of narrative psychology, was perceived to be the way to move forward. A supplementary study on the destination image of Dubai in comparison to other destinations was therefore based on open-ended free elicitation for tourists' stories about destinations. This research is discussed in the next section.

4.2 An Alternative Approach

As a consequence of the unsatisfactory findings of the above traditional approach to measuring perceived destination image, an alternative methodology was developed. In chapters 1 and 2 several arguments were made for the formulation of a qualitative phenomenographic approach, built on the premise of the narrative mode of thought of consumers and their way to perceive, retain and interpret hedonic consumption experiences. Free elicitation of descriptive adjectives for tourism image assessment has been contended by Reilly (1990). It was assumed that if this was done with the co-operation of major cybermediaries and/or DMO web sites that have large numbers of unique visitors, sufficient data could be assembled to quantify these unstructured data, using computerised content analysis (Weber 1990) through artificial neural network analysis software (Woelfel 1998; Woelfel & Stoyanoff 1993). With the growth of the Internet, particularly with regard to the tourist industry, breakthrough opportunities were

and are provided for destination image research, removing resource, time and practical research restrictions that prevented such large scale unstructured approaches in the past.

4.2.1 Survey Methodology

As an alternative methodology, respondents were asked to elaborate, in story format, on their expected travel experience when travelling to one of seven sample destinations they had never visited before. From September 13, 2004 visitors to the virtual travel community Travellerspoint.com were able to participate in this research. The project focused on the image of Dubai, but as compared to other destinations that are in some way either similar or particularly contrasting. The global comparative study included destinations such as the Canary Islands, Flanders (Belgium), Florida, Morocco, Singapore, and Wales. Travellerspoint, with nearly half a million 'unique' visitors a month and its twenty thousand members from 200 countries; would, it was hoped, generate a good responses from all over the world. To maximise response rates, all participants were automatically eligible to win the grand prize raffle draw: a free holiday to Dubai.

Until recently, it would have been virtually impossible to analyse the large quantity of qualitative data that this approach generates, as a researcher would have had to wade through literally hundreds of thousands of words and code them. Then, to assure reliability of the results, at least two other colleagues would have had to go through the same process, creating serious time and man-power demands on limited resources. However today, with computerised neural network content analysis software such as CATPAC, as also applied in the analysis in chapter 3, these types of constraints have been eliminated. With respondents submitting their written accounts online, the data is already in digital format, and therefore the time involved in data-entry and analysis is significantly reduced, from several months, if not years, to only a few days. At the same time it is possible to criticise these types of approached on several counts.

> First, most require that respondents translate imagery processing into a discursive mode (e.g. verbal responses), confusing even more the distinction between the processing modes. Moreover, individual differences in verbosity or vocabulary can influence the nature of this translation. In addition, studies that ask individuals to detail imagery scenarios may not be assessing the extent of detail contained in the image, but rather subjects' abilities to control their image so that details can be specified (MacInnes & Price 1987: p. 485).

Also the level of detail provided by unstructured methodologies is highly variable as it depends upon the verbal and/or writing skills of the individuals used in the study, their willingness to provide multiple responses and their knowledge base of the product (McDougall & Fry 1974). Furthermore, because of the qualitative nature of the data, statistical analyses of the results are limited. In particular, comparative analyses across several products are not facilitated by unstructured methodologies (Echtner & Ritchie 2003). The latter however, can be overcome with the use of recent technologies for automated content analysis. The former issue of verbosity, vocabulary and writing skills was partly dealt with through thorough automatic spelling and grammar checking and pre-reading of all texts, but it is acknowledged that this issue forms a potential limitation of

this study. Again CATPAC was used for the analysis, this time using a case-based approach, as opposed to a sliding window of seven words (see section 3.3.3).

4.2.2 Questionnaire

The central question of the questionnaire was formulated through a Delphi type discussion with the following experts:

- Dimitrios Buhalis, Senior Lecturer and Course Leader MSc in eTourism, Director of the Centre for eTourism Research (CeTR), School of Management Studies for the Service Sector, University of Surrey
- Daniel R. Fesenmaier, Professor and Director, National Laboratory for Tourism & eCommerce, Temple University, Philadelphia
- Matthias Fuchs, Assistant Professor, Department of General and Tourism Management, Leopold-Franzens-Universität Innsbruck
- William C. Gartner, Professor of Applied Economics, Board Chair of the International Academy for the Study of Tourism, University of Minnesota
- Ulrike Gretzel, Assistant Professor, Department. of Recreation, Park and Tourism Sciences, Texas A&M University
- Jafar Jafari, Editor-in-Chief Annals of Tourism Research, Department of Hospitality and Tourism, University of Wisconsin-Stout
- Jamie Murphy, Associate Professor in Electronic Marketing, Business School, The University of Western Australia
- Karl Wöber, Associate Editor of Information Technology and Tourism, Vienna University of Economics and Business Administration, Austria

Delphi participants were first given general information about the research set-up and about the following first page of the questionnaire that would be provided to respondents:

Complete this survey and win a luxury trip to Dubai! To join and win, tell us your story.
This survey is part of a research project sponsored by the University of Leuven, the largest and oldest university in Belgium, and the Rotterdam School of Management, Erasmus University, the Netherlands, a premier business school.

Courtesy of KLM Royal Dutch Airlines and Jebel Ali International Hotels, Dubai, we can offer this stunning prize to one lucky winner:

- *An economy class ticket from any KLM serviced point in the world, via Amsterdam to Dubai.*
- *7 nights at the 5-star Jebel Ali Golf Resort & Spa, a member of 'The Leading Hotels of the World' and part of Jebel Ali International Hotels, featuring its own golf course, over 13 restaurants and bars, a shooting club, horse riding stables, spa, and various other wet and dry sports facilities.*
- *On top of that, Travellerspoint will add 500 EURO's in spending money, if the winner is a member of Travellerspoint (membership is free, register now).*

Notes

- *Data you provide is treated anonymously and we guarantee complete protection of your privacy.*
- *All responses must be in English, otherwise your participation will be invalid.*
- *The answers you give do not influence your chance of winning the prize. The winner will be drawn through a random lottery.*
- *The 3 page survey should not take you long, we estimate no more than 10 minutes.*

Please indicate which of the following destinations you have ever visited before by ticking the Checkbox:

☐ *Canary Island*
☐ *Dubai (United Arab Emirates)*
☐ *Flanders (Belgium)*
☐ *Florida*
☐ *Morocco*
☐ *Singapore*
☐ *The Netherlands*
☐ *Wales*

Exhibit 4-1: First page of the questionnaire

Subsequently, Delphi participants were told that, based on the survey response on the first page, the central question would be put forward. The initially proposed formulation of the central question, as forwarded to participants in the first round of Delphi feedback, is presented in Exhibit 4-2. Destination X would be substituted by a random pick of one of the sample destinations that the survey respondent had indicated not to have visited before. Delphi participants were then asked to do the following:

> "Can I please ask you to read this question carefully and let me know, just by replying to this e-mail what you think? Should it be formulated differently,

> expanded, reduced, whatever? I have asked seven other expert colleagues elsewhere to do the same and after everyone has replied, I will try to incorporate responses and come back to you one more time with the revised formulation."

Imagine that you would decide next week to go on holiday in Destination X. What images or other immediate thoughts come to mind? Tell us your story. What do you think your holiday experience in Destination X would be like; what would you expect to see, or feel, hear, smell, taste?

Please give us as much detail as you can, but do not do any specific research and do not look-up additional information that you do not have right now; just try to express the thoughts that you have at this very moment, positive or negative. We want you to tell us what you think this holiday would be really like. We are NOT asking you to describe your ideal or dream holiday in Destination X, just a holiday in Destination X that could easily become a reality if you wanted it to. If you do not know much about Destination X, your story will probably be relatively short, if you already have very clear ideas about Destination X, your story might be very long. Whatever the case may be, we would be very grateful if you would take a few minutes of your time right now and share your ideas about Destination X with us in the space below.
Remember, there is no right, wrong or best model answer. We want you to tell us what your own ideas are about Destination X, and NOT what you think we want to hear. There will be NO jury assessment of the best story or anything like that. The content of your response will have no impact whatsoever on your chance to win the grand prize. All participants in this survey will have an equal chance of winning, as the winner will be drawn through a random lottery, regardless of the answers provided to the questions in this survey.

Please relate your story of your holiday in Destination X in the space below:

Exhibit 4-2: Initial wording of central survey question as proposed in Delphi

After receiving all comments from Delphi participants in the first round, the central question was reformulated accordingly and sent back to the participants again. After a second round of incorporating comments, the second page of the survey questionnaire was finalised as displayed in Exhibit 4-3.

It is obvious that length as well as complexity of the wording of the central question was reduced significantly, while retaining the main elements that the probing contained, which include:

- Pre-visit perceived destination image;
- Experiential in nature, shared through story telling;
- Including sensory information.

Imagine that next week you will visit Destination X for the first time. Tell us your story. What do you think your experience in Destination X would be like? What images and thoughts immediately come to mind? What would you expect to see, or feel, hear, smell, taste there?

Without any research or additional information, kindly be spontaneous and share with us whatever thoughts come to your mind right now, whether positive or negative. Make your response as detailed or as brief as you like, there are no limits, but try to write in story format; using complete sentences, not just loose words.

If you know little about Destination X, your story will probably be short. If you already have clear ideas about Destination X, your story might be very long. But remember, there is no right, wrong or best model answer; simply express your own ideas about Destination X, and NOT what you think we want to hear. The content of your response will have NO impact whatsoever on your chance to win the grand prize.

Share your ideas about Destination X with us right now, in the space below:

Exhibit 4-3: Final wording of page two of the questionnaire resulting from Delphi-method

Lastly, a third and final page was added to the questionnaire to obtain some additional details about respondents, such as:

- Information sources on which their perception was based (also through an open ended question);
- Attitude towards the one selected sample destination on a ten-point scale ranging from: 10 - Extremely positive, would definitely want to go there; to 1 – Extremely negative, will definitely never want to go there.
- Intention to visit any of the eight sample destinations within two years, as an indication of choice-set membership and prior information search;
- Socio-demographic variables, including: country of residence; homeland (if different from country of residence), number of countries ever visited; age, family life cycle situation; income, education, occupation, gender.

4.2.3 Comparative Destinations in Literature

The selection of case studies was the result of a combination of considerations. First of all, Dubai, Flanders (Belgium) and the Netherlands were included for obvious reasons.

Second, some case studies were selected because of their striking resemblance to Dubai in some way or another:

- The Canary Islands compares to Dubai as an exotic see, sun, sand destination;
- Flanders could be positioned as a complete opposite to Dubai, in terms of its characteristics as a tourism destination;
- Florida compares to Dubai in terms of being the entertainment capital in the region, as illustrated through the development of Dubailand;

- Singapore compares to Dubai as a rapidly developed city state and financial and trade centre in the Orient, contrasting modernity and tradition;
- Morocco compares to Dubai as a new exotic destination with Arabian heritage and expansive desert ecology;
- The Netherlands compares to Dubai with its image of a regional destination and entertainment centre where much is possible;
- Wales is again a complete opposite of Dubai.

Third, in March 2004, National Geographic Traveler reported on a destination scorecard study conducted by Leeds Metropolitan University (Tourtellot 2004). The survey convened a global panel of 200 experts in a variety of fields: ecology, sustainable tourism, geography, urban and regional planning, travel writing and photography, historic preservation, cultural anthropology and archaeology. The experts were asked to "evaluate only those places with which they were familiar, using six criteria weighed as appropriate to each destination: environmental and ecological quality; social and cultural integrity; condition of historic buildings and archaeological sites; aesthetic appeal; quality of tourism management; and the outlook for the future" (Tourtellot 2004: p. 67). Judgements were then indexed on a 1-100 scale indicating the overall level of stewardship at each of the 115 destinations included by National Geographic Traveler. Some of the case studies studied in this dissertation were among the destinations reported on by Tourtellot (2004), such as:

- The Canary Islands which received a low ranking with 52 points (the lowest score being 41);
- Florida, more specifically, Key West which ended up somewhere at the bottom with 42 points;
- Morocco, more specifically Fez historic centre, which received a high score of 71 (the highest score being 82);
- The Netherlands which received an average score of 65;

This must illustrate that it was attempted to incorporate a sample destination from every category of top, middle and low scores.

Third, several of the selected destinations have been described as case studies in the literature on destination branding:

- Florida, best practice (Ritchie & Ritchie 1998)
- Morocco, bad practice (Polunin 2002)
- Singapore, best practice (Ooi 2004)
- Spain (Canary Islands), best practice (Morgan & Pritchard 2004)
- Wales, best practice (Pride 2004; Pritchard & Morgan 1998; Pritchard & Morgan 2001).

The referenced literature provides us with additional information regarding the brand identity of some of the case studies. Pritchard and Morgan (2001) identified those aspects that define Welsh identity, through the analysis of the existing branding campaigns, marketing efforts and consumer research. They include for the overseas market:

- Language (*Cymraeg*)
- Celtic heritage and fascinating history
- Myths and legends

- Welsh emblems: such as the daffodil, the leek, the Welsh dragon and national flag
- Musical tradition
- Arts, crafts and entertainment
- Castles
- Friendly people.

For the UK market:

- Conflict, foreignness and otherness
- Second class citizens
- Inferiority: dingy, untalented and sly
- Remote
- Scenic
- Unspoilt
- Traditional
- Safe
- Down-to-earth people
- Natural
- Activities

Morocco was discussed by Polunin (2002: p. 4):

> Sometimes outsiders are the saboteurs. Morocco thought it had come up with a winning strapline. 'A Feast for the Senses', supported by stunning visuals of the Moroccan countryside and culture. Initially it was widely accepted. However, it had to be dropped when German tour operators told the tourist board that they wanted a sun and sea product for their clients.

The identity of Singapore is summarised by Ooi (2004: p. 247) through the Singapore Tourism Promotion Board's Destination Marketing brief:

> 'New Asia – Singapore' expresses the essence of today's Singapore: a vibrant, multicultural, sophisticated city-state where tradition and modernity, East and West meet in harmony; a place where one can see and feel the energy that makes New Asia – Singapore the exemplar of the dynamism of the South-East Asia region.

Additional considerations for destination selection included the wish to obtain a global spread with destinations from all continents, considering that the survey itself was to be conducted on a global scale. Also, the relative global awareness of the destination and its basic perimeters and characteristics should be relatively easy to assess by a global audience. For instance, popular destination branding case studies such as Australia, Western Australia & New Zealand were considered, for a general global audience, to be either too 'big' and heterogeneous within, or too difficult to delineate.

Half way the data-collection stage, when four hundred responses were collected, it was decided to exclude four destinations - Canary Islands, Morocco, The Netherlands, Wales - from the survey so as to increase response on the remaining four case studies. This lead to the following sample population.

4.2.4 Sample

In total 1,198 responses were collected. Most respondents reacted to e-mail newsletters sent out via Travellerspoint.com at first and later joined by MeetURplanet.com, and TrekShare.com, advertising the survey to the roughly 33,000 members of these three websites. This would indicate a response rate of 3.6%, although it is very difficult to be conclusive on that, as it is impossible to know exactly how many people read the newsletters and/or saw the additional banner-ads on the above websites as well as Mytripjournal.com and iTravelnet.com.

For one thing, it was concluded that the survey did not generate enough responses (32) for The Netherlands and hence that destination was excluded from the analysis. After data quality evaluation and cross-checking of completeness of answers, 1,102 useable questionnaires were retained in the analysis. These provided a total of 111 thousand words of destination image descriptions. Roughly on average a hundred words per respondent, without any significant differences between destinations. Figure 4-3 shows the split of the sample according to the destinations on which respondents provided feedback. Obviously Dubai was over-sampled, being the central destination of reference in this research.

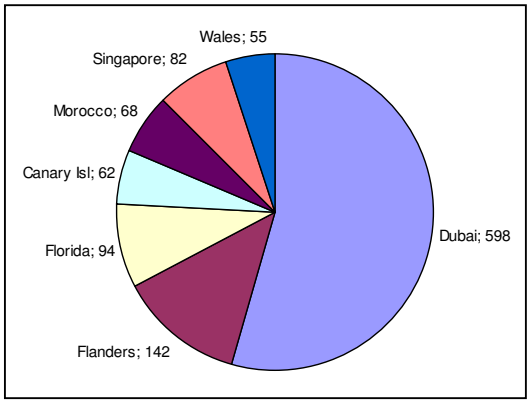


Figure 4-3: Sample across destinations

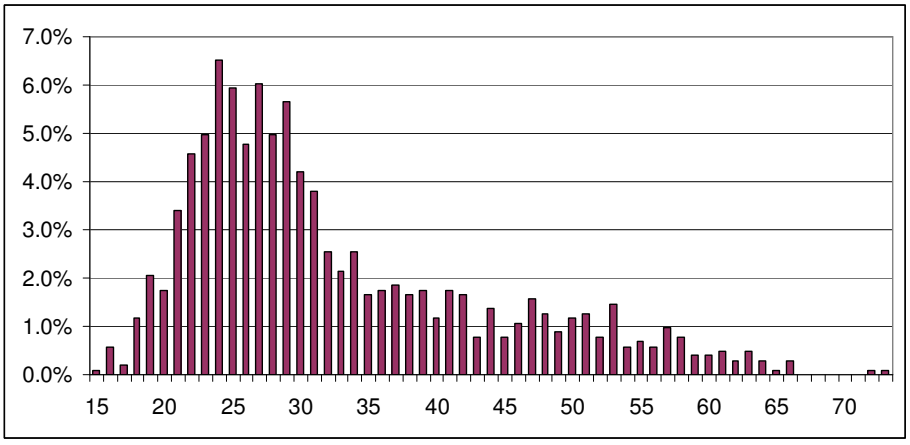


Figure 4-4: Sample according to age of respondent

Table 4-5: Countries of residence of respondents

Country	*N*	*Country*	*N*
United States	204	Algeria	2
Belgium	133	Austria	2
Australia	107	Bangladesh	2
United Kingdom	105	Czech Republic	2
Canada	75	Denmark	2
Netherlands	40	Ecuador	2
India	31	Israel	2
Malaysia	29	Macedonia	2
South Africa	21	Mauritius	2
Singapore	20	Moldova, Republic of	2
Ireland	17	Morocco	2
New Zealand	12	Panama	2
France	11	Romania	2
Spain	11	Suriname	2
Sweden	11	Tanzania, United Republic of	2
Finland	10	Bahamas	1
Italy	10	Bermuda	1
Nigeria	10	Botswana	1
Germany	9	Brunei Darussalam	1
Indonesia	8	Chile	1
Norway	8	Congo	1
Pakistan	8	Cote D Ivoire	1
Switzerland	8	Croatia	1
China	7	Cyprus	1
Ghana	7	Estonia	1
Greece	7	Ethiopia	1
Hong Kong	6	Faeroe Islands	1
Iran (Islamic Republic of)	6	Jamaica	1
Mexico	6	Kenya	1
Philippines	6	Korea, Republic of	1
Argentina	5	Kuwait	1
Brazil	5	Latvia	1
Russian Federation	5	Malta	1
Thailand	5	Nicaragua	1
Uganda	5	Oman	1
Hungary	4	Puerto Rico	1
Japan	4	Qatar	1
Saudi Arabia	4	Seychelles	1
United Arab Emirates	4	Slovakia	1
Cameroon	3	Sri Lanka	1
Egypt	3	St Helena	1
Peru	3	Sudan	1
Poland	3	Tunisia	1
Portugal	3	Uruguay	1
Slovenia	3	Venezuela	1
Taiwan	3	Yemen, Republic of	1
Turkey	3	Zambia	1

Figure 4-4 shows the distribution of the sample according to age. Not surprising, this being an online study, the younger age group up to 30 years of age is relatively overrepresented. 54.7% of respondents is female. Table 4-5 provides an overview of the countries of residence of respondents. Based on country of residence the sample was subdivided according to world continent. This is depicted in the left hand column of Table 4-6.

Table 4-6: Sample across continents

	Residency	*Cultural background*
Europe	39.5%	37.9%
North America	26.5%	26.0%
Asia	13.9%	14.1%
Australasia	11.2%	12.6%
Africa	6.3%	6.6%
Middle- and South America	2.6%	2.7%

Respondents were also asked to indicate their country of origin or 'homeland' if different from the country of residence. 18% of respondents indicated a different country than their country of residence to consider their homeland. However, the migration between continents in the sample is limited to 12.8%. Major continental migration representing more than 1% of the sample involves Europeans and Asians that moved to North America; Asians and Australasians that moved to Europe; and North Americans and Europeans that moved to Asia. The continental split of the sample according to country of origin is considered to be the reference for cultural background in this research study, based on ethnicity (Arnould et al. 2003: p. 75). This follows the work of Hofstede (2001) who also studies cultural differences between nation states and measures cultural values across continents. For this he is often criticised as "nations are not the best units for studying cultures" (Hofstede 2001: p. 73; Hofstede 2003: p. 812). However, they are usually the only kind of units available for comparison. Hofstede (2003: p. 812) argues: "Nation states cannot be equated with national cultures, but does this render conclusions about cultural differences based on nation-level data invalid?". Since the purpose of this research was not to measure cultural background or cultural differences per se, but to assess if cultural background has an effect on perceived image and in what way, country of origin was considered an appropriate estimation of cultural background. This is represented in the right hand column of Table 4-6. Of course, if a respondent did not indicate a different 'homeland', the country of origin is equal to the country of residence.

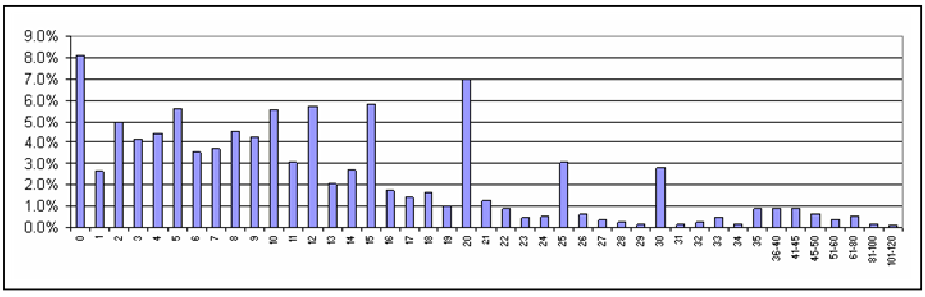


Figure 4-5: Number of countries visited

Figure 4-5 shows the number of countries respondents have visited before. On the one hand 8% of respondents has never been abroad, while on the other extreme, another 8% of respondents has visited more than 35 countries. Figure 4-6 distributes the sample according to income, family life cycle situation and occupation. The sample is very well educated with 80.7% of respondents holding a college or university degree or equivalent while 16.7% completed upper secondary senior high schooling. Obviously this sample is not representative for the world population or even the online world population. It needs to be emphasised though that this research does not intent to provide a global representative description of the perceived image of the sample destinations. Instead it aims to test an alternative methodology for assessing perceived image and subsequently identify differences across destinations. At the same time its objective is to discover variations in perceived image depending on cultural background and socio-demographic characteristics of respondents. Therefore, bias in sample selection was not perceived to be a major issue.

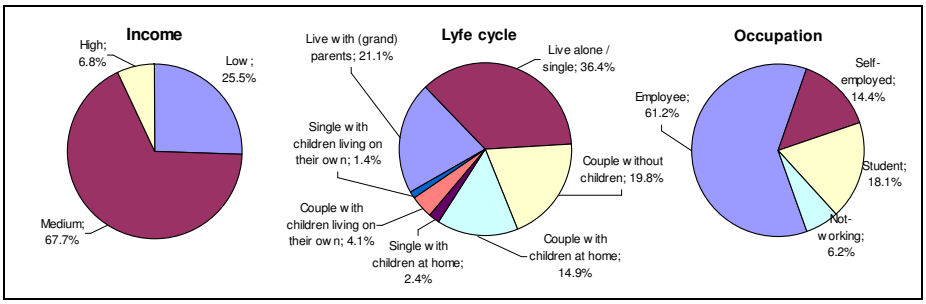


Figure 4-6: Sample according to income, family life cycle and occupation

4.3 Results

Using neural network content analysis software the totality of qualitative responses for each destination was content analysed in order to find most frequently used meaningful words describing perceived image elements. These are listed in Table 4-7. The detailed description of the content analysis procedure, that was followed to obtain these results, is presented in Appendix I. The content of Table 4-7 speaks for itself, but interestingly, the destination specific literature, on which the selection of the sample destinations was based (see section 4.2.3 on page 130), is confirmed. In the National Geographic Traveler study on destination stewardship (Tourtellot 2004), the Canary Islands and Florida received low scores. In our study, these are the only two destinations which respondents perceive to be particularly touristy. As far as reported image attributes is concerned, our findings also match the branding literature. The identity of Wales summarised in aspects such as historic, castles, scenic, natural beauty and friendly people, are characteristics confirmed in our research. References to the Welsh language (7 times), musical tradition (2 times) and even the leek as the Welsh emblem (once) were also found, but not frequently enough to appear in the dominating image. Myths and legends and arts and crafts were not mentioned as image attributes, but we need to emphasise that only 55 responses were collected for Wales. The sabotaged slogan for Morocco – 'A Feast for the Senses' – does not appear to be all that misplaced. At least, according to our findings, the second most important image

attribute for Morocco relates to smell. People indeed seem to relate Morocco to strong sensual images of the smell of spices, aromatic Arabic food and fragrances, heat and colourful surroundings. These are very unique aspects that specifically apply to Morocco, even when compared to Dubai, where these images are far less dominant. It seems that the Moroccan tourist board was on the right track until German tour operators misused their market power. As far as Singapore is concerned, the essence of today's Singapore being a vibrant, multicultural, sophisticated city state where tradition and modernity, East and West meet in harmony, also seems to be well reflected in the perceived image as identified in our study.

Referring back to Table 4-1 several common attributes that appear repeatedly across destinations, can also be identified. These include image components such as for instance: the physical and natural surroundings (buildings / architecture and nature / sea); cultural distance; weather / climate conditions; activities on offer (i.e. shopping or water sports); and tourist facilitation (i.e. hotels). However, for each destination very specific unique image components can also be identified, such as in the case of Dubai: the desert; wealth; luxury; life in the streets; the smell of various fragrances; sand; oil; and camels. Some components are holistic (i.e. Arab and Muslim culture) while others are attribute based (availability and quality of beaches). Some are functional (i.e. shopping) others more psychological (i.e. friendliness of the people). This seems to confirm the theory as developed by Echtner and Ritchie (1993; 2003) as discussed in chapter 2. Nevertheless, the results also show that the importance of unique image components should not be underestimated. More explicitly: for most of the sample destinations included in this study, one or two unique negative image components were identified. For instance in the case of Dubai, over 14% of respondents made reference to the position of women in Muslim / Arab societies. Several misperceptions seem to exist, such as: the need for women tourists to cover their hair in Dubai; or women not being allowed to drive cars; or the idea that one will not see many women in the streets and public places in Dubai. Also in the case of Dubai, 21% of respondents made comments along the lines of "I have never been there or to that region / never visited / never heard of". The same was found for the destination of Flanders, Belgium and Wales. This seems to indicate a general lack of knowledge about the destinations, the comments made being an excuse for not being able to provide much detail about the places in question. Additional analysis of the data, by searching for the phrase "do not know" confirmed this. Indexing this phrase by the number of times it was used by the equivalent of a hundred respondents showed an index of 11.2 for Dubai, 12 for Flanders, and 16.4 for Wales, whiles the index for the Canary Islands and Florida was 3 and Singapore scored 6. This indicates that it was harder for respondents to control their perceived image for the first three destinations. In other cases particular destinations were found to be specifically touristy or suffering from distinctive bad weather conditions. Such misperceptions and negative image components would obviously demand active involvement from DMOs in order to try and change such public perceptions. Unfortunately, when utilising the generally applied traditional attribute based destination image research methodologies, such unique negative components would never be identified.

The same applies to the ephemeral character of image, as illustrated by the case of Florida. Taking into consideration that the fieldwork for this survey was conducted during fall

2004, many references were made to hurricanes, obviously because of the intensive media reporting of the effects of hurricane Frances. It is doubtful that such perceptions would still dominate if this survey was conducted half a year earlier or later. This illustrates the effects of temporal environmental and situational influences. The subjectivity and individual private nature of image is also illustrated. For Dubai, the most frequently mentioned image component, 'hot weather', was still only mentioned by less than 30% of respondents. This seems to indicate that although stereotypical mental images exist, the act of perceiving is a purely individual affair. Many differences among consumers exist, as will be illustrated later. Hence it is not surprising that only measuring common attribute scales does not explain destination choice behaviour, as was concluded in the first half of this chapter.

Table 4-7: Image descriptions for seven sample destinations

Dubai (n=598, words = 63,918)	***% of 3,706 meaningful words***	***% of respondents***
HOT (warm weather / heat / warm climate)	5.8%	28.6%
CULTURE (as in different, local culture)	5.4%	27.1%
HOTEL (famous / 7,6,5-star / luxury / expensive hotel)	6.0%	26.9%
BUILDING (as in amazing / special architecture / buildings)	5.6%	25.9%
DESERT	6.0%	25.4%
SHOP (shops / shopping)	5.5%	24.9%
ARAB (Arabic / Arabian)	5.4%	24.6%
MODERN	4.7%	23.7%
RICH (wealth / wealthy / rich)	4.6%	22.6%
NEVER (never been there / visited / heard of)	3.8%	21.1%
LUXURY (luxurious)	2.9%	15.9%
WOMAN (as in the position of women in Muslim / Arab countries)	3.5%	14.2%
SMELL (smell of spices / food / fragrances / heat)	2.8%	13.2%
WATER (water / sea)	2.5%	13.0%
MARKET(S)	2.3%	12.7%
BEACH(ES)	2.3%	11.5%
STREET (busy /lively / people in the street)	2.3%	11.0%
MUSLIM	2.5%	10.9%
SAND	2.2%	10.6%
OIL	1.8%	9.7%
CAMEL(S)	1.6%	9.2%
Canary Islands (n=62, words = 6,419)	***% of 314 meaningful words***	***% of respondents***
BEACH(ES)	12.1%	48.4%
ISLAND(S)	14.3%	38.7%
WATER (water / sea)	9.6%	32.3%
HOT (warm weather / heat / warm climate)	5.4%	25.8%
SUN (sunny / sunshine)	6.1%	24.2%
SPAIN (Spanish)	6.7%	22.6%
TOURIST (as in touristy)	4.8%	21.0%
HOTEL (comfortable / nice / good / luxurious / fancy hotel)	3.8%	17.7%
SAND	3.8%	16.1%
CULTURE (as in different, local culture)	3.2%	12.9%
BLUE (blue water/ skies)	2.9%	11.3%
NATURE (natural)	2.9%	9.7%

Flanders (n=142, words = 13,260)	***% of 661 meaningful words***	***% of respondents***
BELGIUM (Belgian)	20.1%	53.5%
BUILDING (old / historic buildings / architecture)	5.9%	22.5%
CHOCOLATE(S)	6.7%	21.8%
EUROPE (European)	3.9%	16.2%
CULTURE (as in different, local culture)	4.2%	15.5%
HISTORY (historic)	4.1%	15.5%
OLD (as in old town / buildings / castles)	4.4%	14.8%
STREET (cobbled / narrow / winding streets)	4.2%	14.8%
FRENCH	4.5%	14.1%
NEVER (never been there / visited / heard of)	3.5%	14.1%
SHOP (shops / shopping)	4.1%	14.1%
BEER	3.5%	12.0%
CAFÉ(S)	2.6%	12.0%
FRIENDLY (as in friendly people)	2.7%	11.3%
	% of 454 meaningful words	***% of respondents***
Florida (n=94, words = 7,964)		
BEACH(ES)	16.7%	53.2%
HOT (warm weather / heat / warm climate)	9.7%	35.1%
SUN (sunny / sunshine)	8.6%	30.9%
DISNEY (Disneyland / Disneyworld)	6.6%	29.8%
MIAMI	7.7%	26.6%
AMERICA (American / Americans)	6.6%	25.5%
EVERGLADES	4.6%	21.3%
WATER (water / sea)	5.5%	21.3%
HURRICANE(S)	3.1%	14.9%
TOURIST (as in touristy)	3.3%	13.8%
NATURE (Natural)	2.4%	11.7%
PALM (Palm tree(s))	2.4%	11.7%
WHITE (white beach / houses / paving)	2.6%	11.7%
	% of 236 meaningful words	***% of respondents***
Wales (n=55, words = 4,811)		
GREEN	8.5%	32.7%
RAIN (rains / rainy)	7.6%	27.3%
HILLS	5.9%	25.5%
NATURE (natural)	7.2%	25.5%
PUB	6.4%	25.5%
CASTLE(S)	5.5%	21.8%
COUNTRYSIDE	5.5%	21.8%
NEVER (never been there / visited / heard of)	5.5%	21.8%
BUILDING (old / historic buildings / architecture)	5.5%	20.0%
FRIENDLY (friendly people)	4.7%	18.2%
VILLAGE(S)	4.7%	18.2%
OLD (as in old buildings / castles)	4.2%	16.4%
COLD (as in cold weather)	3.8%	14.5%
WALK (walking / longs walks)	4.2%	14.5%
SHEEP	3.8%	12.7%

Morocco (n=68, words = 7,763)	***% of 374 meaningful words***	***% of respondents***
HOT (warm weather / heat / warm climate)	8.0%	32.4%
SMELL (smell of spices / food / fragrances / heat)	7.0%	32.4%
CULTURE (as in different, local culture)	6.7%	26.5%
SPICE (spices / spicy)	5.6%	26.5%
DESERT	5.6%	25.0%
COLOUR (colours / colourful)	4.8%	23.5%
BUILDING (old / beautiful buildings / architecture)	3.5%	17.6%
ARAB (Arabic / Arabian)	3.7%	16.2%
MARKET(S)	3.2%	16.2%
STREET (busy / lively / people in the street)	4.5%	16.2%
CASABLANCA	4.0%	14.7%
MUSLIM	3.5%	14.7%
AFRICA(N)	3.2%	13.2%
SUN (sunny / sunshine)	2.7%	13.2%
CAMEL(S)	2.9%	11.8%
TEA	3.2%	10.3%
Singapore (n=82, words = 8,298)	***% of 401 meaningful words***	***% of respondents***
MODERN	9.0%	31.7%
CULTURE (as in variety of local culture)	8.2%	30.5%
CLEAN	6.7%	29.3%
STREET (busy /lively / people in the street)	7.7%	26.8%
ASIA(N)	6.7%	25.6%
BUILDING (as in high-rise buildings / special architecture)	5.7%	24.4%
HOT (warm weather / heat / warm climate)	5.0%	18.3%
FRIENDLY (friendly people)	3.5%	17.1%
SMELL (smell of spices / food / fragrances / heat)	3.2%	15.9%
BUSY	3.0%	14.6%
DIFFERENT (as in different culturally)	4.0%	14.6%
SHOP (shops / shopping)	4.2%	14.6%
HOTEL (nice / luxurious hotels)	3.0%	13.4%
MIX (cultural mix)	4.2%	13.4%
AIRPORT (busy / clean / modern airport)	3.0%	12.2%
CHINESE	3.5%	12.2%
COLOUR (colours / colourful)	2.7%	12.2%
EAST (as in Orient)	2.7%	11.0%
EXOTIC	2.7%	11.0%

Also, the experiential nature of tourism was clearly identified. It seemed to be natural for respondents to make comments along the following lines: “hear the waves of the sea”, “feel the heat”, “experience the busy streets”, “smell the spices in the street markets and souks”. The most vivid example of a well written experiential type description of place was, ironically enough, provided by one of the respondents, prior to visit, and not in chapter 3, by one of the organisations projecting destination Dubai. An exert follows:

> The first thing I notice when I get out of the plane in Dubai is the noise, everyone talking in Arabic at the same time, men, women, children, every one enthusiastically speaking to one another. When I take my taxi to the hotel I can hear the mosques calling people to take their prayers, I can see prayer mats placed everywhere around the city and men kneeling on them and placing their heads towards the floor. I can smell the spices when we drive through the market, extraordinary smells of saffron and cinnamon. When we drive across the city I can see mosques and other beautiful white buildings mixed with sky scrapers and modern office buildings. Everywhere I can see rich sheiks coming out of their limousines and entering their offices. But when we drive through the poor areas I can see starving children begging beside the road. In here I feel lucky and ashamed of being from the Western world. We quickly drive past the poor area and I put my feelings of shame in the back of my mind when I see my glorious hotel, red mat placed on the floor and golden onion shaped towers touching the sky. When I enter the hotel I start my cultural lessons and cover myself with a long sleeved top and a long skirt. I enter the new world and a new adventure...

Although this would prove to be a perceived image susceptible to correction post visit (i.e. a tourist demands specification gap seems to occur here) multi-sensory experiential elements seem to be at least as important as gazing (for instance upon buildings / architecture or people). Again, this seems to be difficult to capture in attribute based scales as experiential remarks often refer to very specific unique and characteristic expectations related to a particular destination.

Clustering of Destinations

Differences between common and unique characteristics are illustrated in Figure 4-7. After identifying the list of meaningful words (or image components) as identified in Table 4-7, the total text of all 1,102 responses was fed back into CATPAC. The programme was instructed to analyse the text only searching for the keywords from Table 4-7, plus the reference names of the destinations involved. This way CATPAC would identify which words are often used together and in reference to what destinations. The complete paired comparison similarities matrix for the 67 image components plus 7 destination reference names was fed into the perceptual mapping tool ThoughtView, provided as a CATPAC extension. The result is a three-dimensional model of which a snapshot from one angle is depicted in Figure 4-7.

Obviously it is suboptimal to interpret a three-dimensional model on paper, but nevertheless Figure 4-7 should provide a good insight into the usefulness of this methodology. Sample destinations have been underlined and their corresponding image attributes clustered through the use of circles. Circles are dashed as the boundaries are porous, i.e. not definite on the inclusion or exclusion of components, particularly as dimensions are difficult to interpret in this two-dimensional snapshot. What seems to happen is that image components that are very destination specific or unique characteristics, move towards the boundaries, while common characteristics move towards the centre as they are shared by multiple destinations. Consequently, the most specific image components for destination Dubai are clustered closely together in the top-left

corner of the diagram. As there are more responses in the sample for Dubai (600 compared to 500 for the other six destinations) the unique characteristics for Dubai cluster closely together as their concordance is much stronger than for the other destinations as they appear more often together. These unique characteristics include: hot weather, modern versus old, Arabian culture, and the position of women.

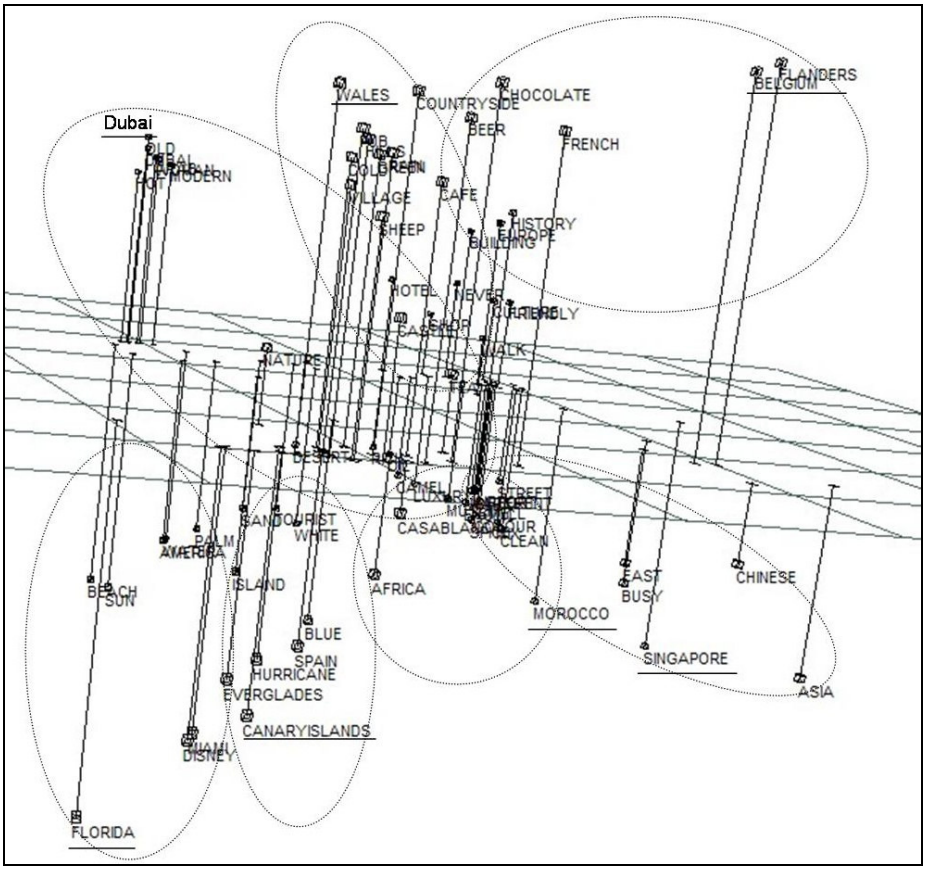


Figure 4-7: Perceptual map of tourist destinations and their image components

Fuzzy-set theory (Viswanathan & Childers 1999; Wedel & Steenkamp 1991) seems to be a useful frame of reference here as it contents that products (i.e. tourist destinations) can be relatively similar on some characteristics, while they are different on others. For instance: Dubai shares many of its characteristics with Morocco (e.g. climate, desert, camels, street markets and aromas), but is different in its modernity, wealth and luxury, characteristics which it shares with Singapore. Also, being located in the Middle East, the position of women seems to be more of an issue here as in Morocco. Based on such an approach Florida and the Canary Islands seem to cluster more closely together, as do Wales and Flanders, while Singapore and Dubai stand out more distinctively.

As common attributes cluster more closely together in the centre, it might prove useful in future research to combine the methodology applied here with attribute scales for these common characteristics in order to identify the relative position of destinations on these attributes. As argued by many (Feighey 2003; Jenkins 1999; MacKay & Couldwell 2004), a combination of measurement techniques seems to be the best approach. The above approach, new in this field, has proven useful in identifying unique characteristics and as a means of mapping destinations relative to each other.

Sources of Information

Respondents were also asked to indicate on what information sources their perceptions were based. This was also done through an open question, the responses to which were analysed in a similar manner as the image responses, using CATPAC. The most frequently mentioned sources of information, referred to by at least 3% of respondents (35 or more), are listed in Table 4-8. The middle column categorises the information source according to Gartner's (1993) typology. This illustrates the tremendous importance of covert induced and autonomous agents – vicarious place experiences and temporal environmental and situations influences – through television, literature, internet, pictures and movies. 11 out of the 19 information sources listed in Table 4-8 include such agents. Also, television as a source of image construction clearly occupies a dominant position, next to direct travel experiences (organic agents), which are obviously the most valuable and rich sources of all.

Table 4-8: Information sources

	Agents	***Mean***
Television	Covert Induced & Autonomous	23.5%
Travel (elsewhere / in region)	Organic	23.0%
Friends	Solicited & Unsolicited Organic	19.1%
Magazines	Covert Induced & Autonomous	13.4%
Internet	Covert Induced, Autonomous & Organic	8.4%
Books	Covert Induced & Autonomous	8.1%
Pictures	Covert Induced & Autonomous	7.9%
People (other people)	Solicited & Unsolicited Organic	7.4%
Movies	Covert Induced & Autonomous	6.9%
Stories	Covert Induced & Autonomous	6.6%
Experience	Organic	5.8%
News	Autonomous	5.7%
Imagination	Organic	5.4%
Newspaper	Autonomous	4.5%
National Geographic Channel	Covert Induced & Autonomous	4.2%
Advertisements	Overt Induced	4.0%
Articles	Covert Induced & Autonomous	3.8%
Media	Covert Induced & Autonomous	3.7%
Documentaries	Covert Induced & Autonomous	3.5%

In addition, Table 4-8 also emphasises the massive importance of solicited and unsolicited organic agents, i.e. word of mouth (mentioned by over a quarter of respondents) and mouse (the internet being in fifth place). Although this was an online research study, the internet does still not seem to occupy a dominant position, even though most respondents are active internet users (mostly members of virtual travel communities). However, the convergence of media and ICT will invalidate this point irrelevant in future (Werthner & Klein 1999: p. 69)Pure overt induced agents such as advertising only appear in sixteenth position, mentioned by just 4% of respondents. However, if television is ranked as information source number one, of course, the logical question to ask is to what extent advertising has been consumed as part of this vicarious place experience, without consciously registering it as such. Nevertheless, Table 4-8 seems to confirm all relationships predicted in the destination image formation model, based on the literature review in chapter 2.

The importance of the various information sources to the different sample destinations has also been assessed through analysis of variance. The results, which are striking in some cases, are reported in Table 4-9.

Table 4-9: Information sources for each of seven sample destinations

	Dubai	***Flanders***	***Florida***	***Canary***	***Morocco***	***Singapore***	***Wales***	***F***	***p***
Television	24.1% [c]	**8.5%** [a]	**52.1%** [d]	**8.1%** [a]	16.2% [b]	26.8% [c]	29.1% [c]	**12.85**	**0.000**
Travel	23.9%	14.8%	21.3%	24.2%	27.9%	26.8%	23.6%	1.26	0.275
Friends	**24.2%** [c]	**6.3%** [a]	13.8% [b]	19.4% [b]	17.6% [b]	14.6% [b]	12.7% [b]	**5.03**	**0.000**
Magazines	15.1% [c]	**2.8%** [a]	**24.5%** [d]	6.5% [b]	10.3% [b]	15.9% [c]	10.9% [b]	**4.93**	**0.000**
Internet	10.0%	6.3%	7.4%	8.1%	5.9%	4.9%	5.5%	0.92	0.482
Books	7.4%	7.0%	12.8%	1.6%	11.8%	9.8%	10.9%	1.51	0.172
Pictures	8.2%	5.6%	8.5%	3.2%	4.4%	14.6%	9.1%	1.56	0.156
People	6.0%	5.6%	8.5%	14.5%	7.4%	11.0%	10.9%	1.61	0.141
Movies	4.3%[a]	4.9% [a]	**19.1%** [d]	3.2% [a]	**16.2%** [c]	7.3% [a]	10.9% [b]	**6.99**	**0.000**
Stories	5.5%	7.0%	5.3%	11.3%	5.9%	9.8%	10.9%	1.11	0.355
Experience	4.8%	9.9%	1.1%	9.7%	4.4%	9.8%	5.5%	2.25	0.037
News	7.0% [b]	2.1% [a]	**12.8%** [c]	1.6% [a]	1.5% [a]	4.9% [a]	**0.0%** [a]	**3.65**	**0.001**
Imagination	5.0%	7.0%	2.1%	8.1%	4.4%	7.3%	7.3%	0.80	0.571
Newspaper	5.2%	2.8%	7.4%	3.2%	2.9%	3.7%	1.8%	0.85	0.531
NGC	3.5%	3.5%	5.3%	6.5%	8.8%	3.7%	3.6%	0.95	0.461
Advertisements	5.7%	0.0%	2.1%	3.2%	2.9%	1.2%	5.5%	2.26	0.036
Articles	5.7%	0.0%	2.1%	3.2%	2.9%	1.2%	5.5%	1.20	0.303
Media	5.7%	0.7%	3.2%	0.0%	1.5%	0.0%	3.6%	2.80	0.010
Documentaries	4.7%	2.8%	4.3%	0.0%	0.0%	2.4%	1.8%	1.36	0.226

Note: Rows that contain significant variance between groups according to ANOVA's F-test are indicated in bold. In those cases, means with a different superscripted letter ([a, b, c, d]) are significantly different at the .05 level according to Duncan's post hoc test, while the letters indicate a within-row ranking ([a] are groups with the lowest means, [d] are groups with the highest means).

The tremendous importance of vicarious place experiences through television, movies and magazines is overwhelming in the case of Florida. Also news reporting is relatively important when referring to Florida, but this could be a confirmation of the transitory effects of autonomous agents such as the media coverage of hurricane Frances at the time. News reporting seems to be of little importance for Wales though. For Dubai word of

mouth appears to be of particular relevance as are the media in general to some extent. The latter might not be surprising considering the establishment of Dubai Media City. Movies have had their particular impact on the image of Morocco, but the top four information sources are remarkably less frequently mentioned in the case of Flanders. This seems to support the notion that the image of destination Flanders is less developed as for other destinations. Again, also these results seem to confirm the influence of all various types of agents on the image formation process, but more importantly it emphasises its dynamic and ephemeral nature.

Differences between respondents for destination Dubai

Table 4-10: Perceived image according to cultural background

Dubai (n=598, words = 63,918)	*North America (n=168)*	*Latin America (n=23)*	*Europe (n=200)*	*Africa (n=42)*	*Asia (n=80)*	*Austral-asia (n=75)*	*F*	*p*
HOT	25.0% [b]	17.4% [a]	37.0% [c]	14.3% [a]	22.5% [b]	26.7% [b]	**3.11**	**0.009**
CULTURE	28.0%	34.8%	29.0%	26.2%	20.0%	33.3%	0.85	0.512
HOTEL(S)	19.6% [b]	30.4% [b]	34.5% [c]	14.3% [a]	36.3% [c]	21.3% [b]	**3.78**	**0.002**
BUILDING(S)	27.4%	26.1%	29.0%	11.9%	23.8%	24.0%	1.16	0.326
DESERT	22.6%	30.4%	32.0%	21.4%	25.0%	29.3%	1.06	0.382
SHOP(S)	17.9% [a]	13.0% [a]	29.0% [b]	28.6% [b]	36.3% [c]	22.7% [b]	**2.79**	**0.017**
ARAB	26.8% [b]	30.4% [c]	33.5% [c]	11.9% [a]	32.5% [c]	22.7% [b]	**2.08**	**0.067**
MODERN	25.0%	17.4%	29.5%	9.5%	26.3%	22.7%	1.71	0.130
RICH	27.4%	21.7%	28.5%	21.4%	16.3%	26.7%	1.09	0.365
NEVER	20.8%	26.1%	23.0%	19.0%	21.3%	20.0%	0.17	0.975
LUXURY	10.1% [a]	13.0% [a]	28.5% [b]	2.4% [a]	12.5% [a]	9.3% [a]	**7.69**	**0.000**
WOMAN	19.0% [c]	26.1% [d]	15.5% [c]	0.0% [a]	10.0% [b]	12.0% [b]	**2.87**	**0.014**
SMELL	14.9%	17.4%	13.5%	7.1%	10.0%	17.3%	0.75	0.584
WATER	8.9% [a]	17.4% [a]	20.0% [a]	11.9% [a]	12.5% [a]	14.7% [a]	**1.96**	**0.082**
MARKET(S)	15.5% [b]	13.0% [b]	12.5% [b]	14.3% [b]	6.3% [a]	24.0% [c]	**2.19**	**0.054**
BEACH(ES)	10.1% [a]	26.1% [c]	14.5% [b]	4.8% [a]	10.0% [a]	8.0% [a]	**1.97**	**0.081**
STREET(S)	9.5%	17.4%	13.0%	7.1%	6.3%	16.0%	1.28	0.270
MUSLIM	10.7%	17.4%	12.5%	11.9%	11.3%	4.0%	1.05	0.386
SAND	10.1%	21.7%	13.0%	11.9%	3.8%	9.3%	1.68	0.138
OIL	14.9%	4.3%	10.0%	11.9%	5.0%	14.7%	1.54	0.176
CAMEL(S)	6.5%	13.0%	11.5%	4.8%	6.3%	12.0%	1.14	0.339

Note: Rows that contain significant variance between groups according to ANOVA's F-test are indicated in bold. In those cases, means with a different superscripted letter ([a, b, c, d]) are significantly different at the .05 level according to Duncan's post hoc test, while the letters indicate a within-row ranking ([a] are groups with the lowest means, [d] are groups with the highest means).

Differences based on cultural background have been estimated using country of origin (or 'homeland') as a reference. Countries have been subsequently clustered according to world continent (for a detailed justification, see section 4.2.4 page 133). The results of analysis of variance are shown in Table 4-10. Several significant differences in the perceived image of Dubai, are indicated in bold. It appears that particularly Europeans suffer from extravagant expectations about Dubai as a travel destination. Their perception of Dubai as a leisure destination which offers luxury, fancy hotels, sea, sun and sand, is most vivid. Dubai as a shopping paradise is also recognised by Europeans, but is even more evident to people from Asia, who are also quite aware of the impressive hotels that are located in Dubai. The

Arab identity of Dubai is more often commented upon by Europeans and Asians. Most striking, but not surprising though, is the fact that particularly respondents from the America's and to a lesser extent Europeans, comment on the position of women in Dubai. This is much less an issue to Asians and no issue at all to Africans. Of course, this can easily be explained from a religious perspective as well as the fact that these issues have been receiving increased attention in Western media. It seems that many misperceptions exist, which are attributed to the Middle East or Arab world as being one homogeneous entity, while in fact, as the research background description of Dubai in chapter 3 would have shown, significant heterogeneity exists. These results seem to confirm many of the points made by Said (1981).

Table 4-11: Perceived image according to gender

Dubai (n=598, words = 63,918)	***Female (n=305)***	***Male (n=258)***	***t***	***p***
HOT	28.4%	26.7%	0.43	0.666
CULTURE	29.4%	26.0%	0.90	0.371
HOTEL(S)	28.7%	26.4%	0.62	0.535
BUILDING(S)	27.1%	24.8%	0.61	0.545
DESERT	24.4%	29.8%	-1.44	0.152
SHOP(S)	28.7%	22.1%	**1.80**	**0.072**
ARAB	27.1%	30.6%	-0.93	0.354
MODERN	25.7%	26.0%	-0.06	0.951
RICH	29.0%	22.5%	**1.78**	**0.076**
NEVER	25.7%	18.2%	**2.16**	**0.031**
LUXURY	17.5%	14.3%	1.02	0.309
WOMAN	23.1%	5.4%	**6.30**	**0.000**
SMELL	16.8%	10.5%	**2.21**	**0.027**
WATER	13.2%	16.3%	-1.03	0.305
MARKET(S)	16.2%	12.8%	1.14	0.256
BEACH(ES)	11.9%	11.6%	0.09	0.926
STREET(S)	14.5%	7.8%	**2.58**	**0.010**
MUSLIM	10.9%	10.9%	0.01	0.988
SAND	10.9%	10.9%	0.01	0.988
OIL	9.9%	14.0%	-1.47	0.143
CAMEL(S)	10.6%	7.0%	1.51	0.132

Table 4-11 reports on the analysis of variance according to gender. Again, several significant differences are found. Women are more likely to comment on Dubai as a rich shopping paradise. Also, references to experiential aspects of street markets and the fragrances and spices that one would expect to smell there, are more often attributed to women. Most importantly though, but again not surprising, is the fact that it is mainly women that comment on the position of women in Dubai. Apparently, it is not just a general perception, but a particular concern that probably needs to be addressed. If more than a quarter of women in the West hold these (mis)perceptions, it probably inhibits a quarter of the market from travelling to Dubai for that reason, as the majority of leisure travel involves couples and families (Government of Dubai - Department of Tourism and

Commerce Marketing 2000: p. 27). Of these travel parties the female members might have a large impact on decision-making if such perceptions prevail. Surprising though is the fact that it is also women that more often comment that they have never heard of Dubai or visited the region. Hence this would again confirm the existence of stereotypical generalisations.

Respondents were also asked to indicate, on a 10-point scale, what their attitude is towards the sample destination as a travel destination. Ranging from 10 "extremely positive, would definitely want to go there" to 1 "extremely negative, will never want to go there", Dubai received an average score of 8. To measure direct intention to visit, respondents were subsequently asked if they plan to visit the sample destinations within the next two years, yes or no. To measure the impact of attitude and intention to visit on image, correlation coefficients between these variables and the various image attributes were calculated. Those respondents who's attitude is less positive about Dubai and those who are less likely to visit are more likely to comment on the hot weather in Dubai ($r=-.146$, $p<.000$), the wealth in Dubai ($r=-.162$, $p<.000$) and the position of women ($r=-.095$, $p=.023$).

Also travel experience was measured by asking respondents to indicate how many countries in the world they have visited before. For those respondents commenting on Dubai, this number was 12.7 on average. To measure the impact of travel experience on image, correlation coefficients between this variable and the various image attributes were calculated. Those respondents with more travel experience are more likely to be informed about Dubai's modernity ($r=.131$, $p=.001$) and wealth ($r=.115$, $p=.005$) built up from oil revenues ($r=.119$, $p=.004$) and the fact that it is near the sea ($r=.106$, $p=.009$).

These results confirm that self-focus and differences according to cultural background, personal and psychological characteristics do exist, although the research set-up was not primarily focused towards identifying such differences and hence associations are often weak. These results should therefore be confirmed through future research and be treated as indicative qualitative assessments, precisely according to the objectives if the study.

4.4 Conclusion

As far as methodology is concerned, the first part of this chapter illustrates the inadequacy of prevailing methodologies for measuring perceived destination image. Through the use of the standard common attributes identified in literature and corroborated by DMO management in the Netherlands, we were unable to explain differences in destination choice behaviour among Dutch consumers. Based on the AIDA-model we identified four groups of consumers: those who frequently spend their holidays within their own country; those who would consider spending their holiday in their own country, but do not; those who always tend to go abroad on their holidays and for whom a domestic holiday is no option; and finally, those who have not even considered where to go on holiday, i.e. consumers that do not travel at all or infrequently. Contrary to our expectations, the perceived image of the Netherlands as a domestic holiday destination did not differ significantly between these four groups. This contradicted literature, which states that perceived destination image determines consumer preference and subsequently destination choice behaviour. The logical explanation for these unexpected results was to assume that

the common attributes that were identified had been reduced to hygiene factors and were incapable of measuring subjective perceptions of individuals and self congruity.

Nevertheless, based on the subsequent study, in which we applied a phenomenographic approach, we need to conclude that as far as perceived destination image measurement is concerned, we should not dismiss common attribute scales altogether. In our second study of perceived image, we allowed respondents to express their perceived image in free-text form. The use of neural network based computerised content analysis software facilitated us to achieve a thorough and objective analysis of this vast amount of qualitative data, at the same time allowing for quantification and the application of statistical procedures. The results produce a vivid three dimensional picture of the differences and commonalities between seven sample destinations including Dubai. For each destination unique characteristics are identified, but common attributes across destinations are observed as well. The limitation of our second approach is that common attributes move towards the centre of our three-dimensional clustering space, as these attributes are shared by several of the destinations that were included in the study. This makes it virtually impossible to assess the relative position of different destinations on these common attributes. Hence, this is where attribute scales will come in useful, so as to allow for an importance-performance analysis (Go & Govers 1997a) of destinations on such common attributes.

Our phenomenographic analysis proves to be a useful and valid though. Face validity is evident when examining Table 4-7 as it reveals no unexpected or peculiar findings for any of the seven destinations. Discriminant validity is also apparent as differences between destinations are clearly identified. Based on the application of fuzzy-set theory we are able to establish 'family resemblance' between destinations on some attributes, while others clearly represent distinctive unique attributes for the different sample destinations. As expected, Wales and Flanders are positioned closer together, as are the Canary Islands and Florida, while Singapore and Dubai stand out more uniquely, although they share characteristics of modernity as rapidly developing city-states. The Canary Islands and Florida compare to Dubai as see, sun & sand destinations, while Morocco compares to Dubai as an exotic destination with Arabian heritage and desert habitat.

Convergent validity is established through confirmation of image attributes in literature. The elements of the brand identity of Wales as identified by Pritchard and Morgan (2001) are largely confirmed, as is the "essence of today's Singapore" according to Ooi (2004). Morocco proves to have tremendous opportunities for projecting and formulating a product offering impregnated with uniqueness and local identity. Our research confirms that the intended branding campaign as discussed by Polunin (2002) focussing on Morocco's tourism potential based on its identity of being "a feast for the senses", was well chosen. We observe that differentiating affective perceptions are already present in many consumers' perceived images of Morocco. Motion pictures have done the country favours in that respect and they would provide good opportunities for projecting consistent images across channels by exploiting these vicarious experiences. It is disgraceful that a destination's positive efforts towards achieving such a positioning, are being sabotaged by outsiders who base their judgement on myopic short-term profit maximisation perspectives. As a result, in the case of Morocco at least, it is the major tour operators that

contribute largely to the commoditisation of tourism and causes destinations to be dependent on short term trends and market fluctuations.

However, although the results seem to be valid, considering the sample size relative to the global scale of the analysis, the reliability of the content of the results can be questioned. We cannot guarantee that a repeated application of our methodology, with a different sample, will generate the exact same results. In other words, the perceived images that we found in our research are not likely to be fully representative for the whole population. However, it was not our primary goal to generate such representative results. Our objectives were twofold. First we intended to test the methodology, by exploring the extent to which perceived image descriptions for each destination individually could be measured and confirmed in literature, as well as differences between destinations identified based on fuzzy-set theory. Second, we intended to test if differences in perceived image across different market segments based on cultural background and personal and psychological characteristics, could be confirmed using this methodology. With reference to our argumentation above, we can conclude that the results of our analysis have contributed successfully to our objectives.

Our phenomenographic analysis also clearly provides preliminary confirmation that the various components in the bottom half of the destination image formation model indeed have their influence on perceived image. Self congruity is an issue as differences in perceived image across cultural groupings and gender classes are confirmed. Contrary to Beerli and Martín (2004a) we also find that secondary sources of information are of tremendous importance. Particularly covert induced and autonomous agents have a dramatic influence as over sixty percent of information sources mentioned involves these types of agents. Vicarious experiences, such as motion pictures, television and literature are mentioned by respondents. Even National Geographic Channel is mentioned in particular. Autonomous agents such as news coverage, news papers and television in general, which represent the most important source of information, are also acknowledged by respondents. The media in general therefore have a tremendous influence. However, the role of internet was less important than we expected considering the sampled population. Nevertheless, as media and ICT will converge in future (Werthner & Klein 1999: p. 69) both will have a significant impact on image formation (Magala 2001).

At the same time we need to support Beerli and Martín (2004a) in their conclusion that organic agents, i.e. primary sources of information, are essential as well. The second most relevant source of information that respondents refer to is their own travel experience or those of others. Hence, also solicited and unsolicited agents, word-of-mouth from friends and others, are highly relevant. The influence that various image formation agents have on perceived image also varies across destinations. Motion pictures have been mentioned specifically in relation to Morocco and Florida, where in the latter case, also television in general is an extremely relevant image formation agent. The case of Florida illustrates the ephemeral character of images and the dynamic influence that autonomous agents such as news reporting can have on the model. Solicited and unsolicited organic agents seem to be particularly significant with reference to Dubai.

The experiential nature of tourism is also clearly identifies. Respondents seem to have no difficulty to refer to mental imagery of things that they expect to hear, smell, taste or see; particularly the unsolicited references to specific colours for several destinations being of interest. Again it is striking that this is particularly true in the case of Morocco, where the DMO had apparently wisely chosen to focus on such elements. Also, affective social aspects of the tourism experience and the related image appear to be of relevance as expected. References to friendly people, the local culture or touristic nature of a destination are made frequently. Of unique relevance here is the fact that respondents in the West and especially female respondents commented on the position of women in Dubai and their concern about social restrictions that would possibly apply.

Our findings therefore confirm many of our assumptions and substantiate the destination image formation model. However, as a last remark we need to conclude that as a result of the methodology applied, causal relationships between the various image formation agents and the content of the image, or the way in which agents change the image, are not identified. Our research provides preliminary evidence of the existence of the various components in the model. It is left for future research to test the causal relationships statistically.

5 CONCLUSIONS & FUTURE RESEARCH DIRECTIONS

> *A national brand strategy determines the most realistic, most competitive and most compelling strategic vision for the country, and ensures that this vision is supported, reinforced and enriched by every act of communication between the country and the rest of the world* (Anholt 2003: p. 11).
>
> *When countries change, it can take quite a long time for damaging, left-over stereotypes to disappear. Branding works when it projects and reinforces a changing reality – but it can be counter-productive if it isn't rooted in fact* (Olins 1999).

Our research has generated satisfactory results which have contributed towards achieving our objectives. These can roughly be grouped into applied results and scientific results. In the following sections we will first present some conclusions from an applied perspective. This leads us to draw some parallels with the destination branding literature and provides us with some potential solutions to dealing with the issues surrounding the bridging of the gaps. This also provides ample opportunities for future research directions. Then, at the end of this chapter we will complete our journey by drawing more general conclusions and examining our contributions to science and society in general.

5.1 Projected versus Perceived Image

The theoretical conceptualisation of the dynamic destination image formation model has identified three ways in which customer satisfaction can be affected in the host-guest encounter. Although not unique to situations in which culturally different hosts and guests are involved, these gaps form particular challenges in such cases.

- Gap 1, where the unique cultural identity can be a sustainable competitive advantage, but the challenge is to build a tourism product using this uniqueness and projecting it through consistent narratives is such a way that it is made attractive to potential guests from culturally diverse markets;
- Gap 2, where the perceived destination image is skewed because of different cultural interpretations of the projected images, situational influences or biased word-of-mouth. In such a case the tourism experience might be choreographed according to plan, but fails because the guest is reading from a different script;
- Gap 3, where although host and guest are reading from the same script, their interpretations might be different, resulting in conflicting behaviour.

From an applied perspective, the analysis of projected and perceived images, has allowed us to identify several aspects concerning the nature of the gaps in Dubai. Relevant to the tourism development strategy, three main issues have been identified. First of all, while the public sector and in particular the DMO aim at projecting the uniqueness, culture and heritage of Dubai, the private sector focuses on promoting modern tourism and business facilities. In many cases we even suspect a denial of the existence of local people and a

removal of the relationships between the guests and the local culture. Hence, the various players are working across purposes and should realise that public and private interests are more connected than they have appreciated thus far. The interrelation of strategic challenges, particularly as far as the need to project consistent images is concerned, has become more important with the expansion of global media and the proliferation of ICT (Magala 2001). Convergence of the two will only accelerate this process.

Secondly, the experiential nature of tourism is hardly reflected in the projected image of Dubai. Ironically the best experiential descriptions of Dubai, that include rich information about what one would expect to see, hear, smell or taste there, are provided by some of our respondents that have never actually visited Dubai, and not by the texts that we analysed as part of our analysis in chapter 3. Much can be learned from the hedonic consumption literature and the academic research in the area of tourism marketing, which found that sensory information regarding consumer perceptions of places can be researched and bundled into sensory themes according to specific patterns of association. Some of our results related to perceived image seem to confirm this. Particularly in an online environment, when projecting virtual experiences, adding such vividness would help to create telepresence. The tourism industry would be wise to acknowledge the fact that consumers are not purely rational decision-makers and affective perceptions are indeed of tremendous importance.

Thirdly, the factors that have contributed to Dubai's success, as have been identified in literature, seem to be particularly relevant within the context of global flows. However, we are unsure if the same applies within the local setting. This is illustrated by the fact that the tourism industry, particularly the transport and hospitality sectors in Dubai, have failed to support the efforts of the DMO in projecting the uniqueness of Dubai. These companies themselves operate primarily in the space of global flows, detached from local reality. Progression in Dubai is rapid, economic growth has been remarkable and modernisation is taking place at an unprecedented pace. This has been illustrated by the way in which new technologies have been adopted and aspects of globalisation localised. Tourism itself has led to rapid development, but also brought along social issues. It would be advisable for the Dubai government to study the impact that these processes have had on the local population and determine the extent to which the sense of identity among the population can provide opportunities for an enriched tourism product.

From a tourist demands specification perspective several other issues were pinpointed. First of all, the perceived image of Dubai in general seems to be stereotypical and based on generalisations about the Middle-East and Muslim society in general, such as suggested by Said (1981). References are made to general characteristics such as Arab culture, Muslim religion, desert, camels, oil and sand. More specific unique attributes relevant to Dubai, such as the royal family, pearling, dhows, the creek, the majlis, falconering, calligraphy, poetry, henna painting and windtowers, to name a few, are not mentioned at all, or just once or twice among six hundred respondents. Ironically, when referring to dancing, the only references found relate to the perception of belly dancing being indigenous to the region, which in fact is not the case, but involves an invented tradition created for the sake of tourism. Although these perceptions are not dominant and hence do not appear in our results described in chapter 4, it is illustrative of the fact that tourism imagery has filled the

void left by colonialism. The only unique dominant image that does exist is that of Dubai being a modern wealthy city providing luxurious facilities as a see, sun, sand destination that combines leisure with expansive shopping facilities. Particularly in Europe it is these extravagant expectations that dominate. Another far less dominant image, which is shared with Morocco and holds promises for projecting uniqueness, relates to the souks, where respondents report images of smells and fragrances in busy street markets.

In that sense Dubai should be on its guard not to fall prey to Western intermediaries and multinational management companies that want to exert cultural power and construct place identity through tourism, such has happened in the case of Morocco. The myopic views and orientation towards short-term yield maximisation of such players, only leads to the projection of ephemeral images and the creation of simulacra environments. This in turn would merely result in further commoditisation of destination Dubai.

Also, our analysis allowed for some particularly negative image attributes to be identified; two in the case of Dubai. First of all, for many respondents it proved difficult to come up with any mental representations of Dubai, suggesting that Dubai does not have a very strong image internationally, at least not when compared to some of the other sample destinations included in our study, such as Florida, Morocco or Singapore. Secondly, particularly women in Western societies have misperceptions about the position of women in Dubai. They are concerned about the need for women tourists to cover their hair in Dubai; or women not being allowed to drive cars; or the idea that one will not see many women in the streets and public places. Such social issues need to be addressed and it would help for instance to start a public debate on the role of women in Dubai's society. Co-opting the customer could be a good approach to correct these distorted images. Providing opportunities for potential and first time visitors to discuss cultural issues with front line employees and managing consistency across experiences, online and offline and through the media, in order to provide subtle cues towards an ideal image, seem to be important measures that need to be implemented in Dubai.

Lastly, from a tourism delivery and supply perspective, although not specifically examined in our research we anticipate that most first-time visitors to Dubai will be surprised. Taking into account the inconsistency of projected images and the incomplete generalised and distorted perceived image, it is highly unlikely that the actual tourism experience will be in line with expectations. This does not automatically mean that customer satisfaction levels will be negative, it depends on relative performance compared to expectations. This, however, was not part of our research objectives, but past research has provided ample proof of the fact that perceived images change dramatically during and after the visit. Because of this existing evidence we concentrated on the perceived image prior to visit, but it would be an interesting area of research in the case of Dubai to assess the delivery and supply gap. Because, adding to the challenges of destination Dubai is the fact that the industry is operated and managed almost exclusively by expatriate workers and executives, who are themselves firmly positioned in the space of global flows, but often ignorant of the local identity, cultural origins, habits, traditions and heritage of Dubai and the local population. All the three TDS-gaps, as we have been able to identify and portray them in the case of Dubai, therefore need bridging. Some suggestions for doing that are provided in the next section.

5.2 Parallels with Branding

From a polyinclusive perspective, it is the stories that we construct from trip-related expectations and experiences that create meaning in mind space, but also in social space, shared with others in information space. As Go and Fenema (2003) correctly observe, organisations facilitate this process by "developing brand stories, concepts and visions that drive organisational operations and culture". These brand stories often include emotional aspects and real or fantastic imagery that includes visual and auditory sensations, and sometimes even gustatory (Coca Cola), olfactory (scented pages in fashion magazines) or tactile (soft teddy bear premium with quantity fabric softener purchase) experiences. As part of the re-engineering process that is taking place in the tourism industry, where consumers create confused destination images based on an onslaught of information from a wide variety of online as well as offline sources of varying quality, the online environment posts whole new challenges, and destination branding might just hold one of the keys to dealing with this.

Reversely, in the connected economy the speed of change increases the difficulty for providers to know what customers want and subsequently translate such knowledge in appropriate processes and outcomes. Therefore a key function in the information age is to elicit customer experiences and perceptions as input into the business model. The multiplexity of interactions between customers and the products and services in a country or at a mega-event provide temporary opportunities to connect and add value both at the individual- and group level. In a global arena interdependencies are created that require the mapping of the factors relevant within the value creation cycle to enable, exploit and leverage seamlessly integrated, semi-customized, knowledge intensive service experiences. The theoretical models of the tourism network, service experience, intra- and inter-organisational collaboration, country-of-origin effects and brands are operationalised to enable interacting actors to maximize customer value and destination image projections at minimal cost.

The usefulness of destination branding in this respect is contended by Gnoth (2002) and Kriekaard (using city names (1993)). Van Raaij (1995: p. 16) refers to the term 'brand' as being closely related to aspects of identity, image, quality and tourist satisfaction. In fact, Riezebos (1994: p. 264) compares a number of constructs such as perceived brand quality, brand attitude, brand image, brand loyalty and brand equity, with the construct being studied in his book on brand added value. Wolf (2003) stresses the urgent need for the tourism industry to take branding serious, particularly with the growth of the online market. But, of course, in this context of bridging the image gaps as presented in this dissertation, we wish to refer to branding as being much more than creating a logo and slogan. This is well supported by Fesenmaier and MacKay.

> As something more than just a pretty picture, image is purported to represent and convey a culture as it is expressed by a selective authoritative voice. Processes such as branding which use names, designs and symbols to build image, can leave much out. As a result, image is a simplified impression of a place for which cues are used to trigger inferences and influence attitudes. Sometimes these cues have

> unintended as well as intended symbolic value (Fesenmaier & MacKay 1996: p. 39).

Kotler (2000: p. 404) lists the various levels of meaning that a brand could possess: Attributes; Benefits; Values; Culture; Personality; and the User (consumer). The overlap with many of the components discussed as part of the destination image formation model in chapter 2 is striking.

5.3 Destination Branding

Following Hall ((1996) see section 2.3.2) tourist destinations are composed not only of cultural heritage, but of symbols and representations. A tourist destination is a discourse - a way of constructing meaning -, which influences and organises both the actions of tourists and the conceptions of the local residents themselves. Tourists perceive images by producing meanings about a particular tourist destination with which they can identify. These are contained in the stories, which are told about it, memories, which connect its present with its past, and images, which are constructed of it. As Anholt (2002: p. 230) explains, it is important to study "the different ways in which national brands are perceived in different countries and regions…and how this diversity of perception can be managed in international branding campaigns". Tourist destinations use narratives, consciously or unconsciously, to influence the consumer's decision-making process and develop destination brand equity.

Aaker and Joachimsthaler (2000: p. 17) define brand equity as a set of "brand assets (or liabilities) linked to a brand's name and symbol, that add to (or subtract from)…(the value provided by)… a product or service". The assets and liabilities on which the brand equity is based will differ from context to context". However, they can be grouped into five categories: brand loyalty; name awareness; perceived quality; brand associations in addition to perceived quality; and other proprietary brand assets - trademarks, channel relationships. The Brand equity model (Aaker & Joachimsthaler 2000) provides the basis for the detailed deconstruction of the destination image paradigm, as discussed, from a gap perspective. That is: what specific gaps should destinations bridge in order to influence tourist decision-making so that loyalty, positive brand awareness, perceived quality and other brand associations and assets to a particular destination ensue?

The multidimensionality of destination branding is illustrated in Upshaw's brand identity model as depicted in Figure 5-1, which includes much more than just a name and logo. It refers back to several of the 3-gap related concepts as discussed in this dissertation, such as: strategic personality (identity), marketing communications, and product delivery and supply in terms product/service performance, promotion/merchandising and selling strategies. Hence, it will be used as a guidance for the rest of this chapter.

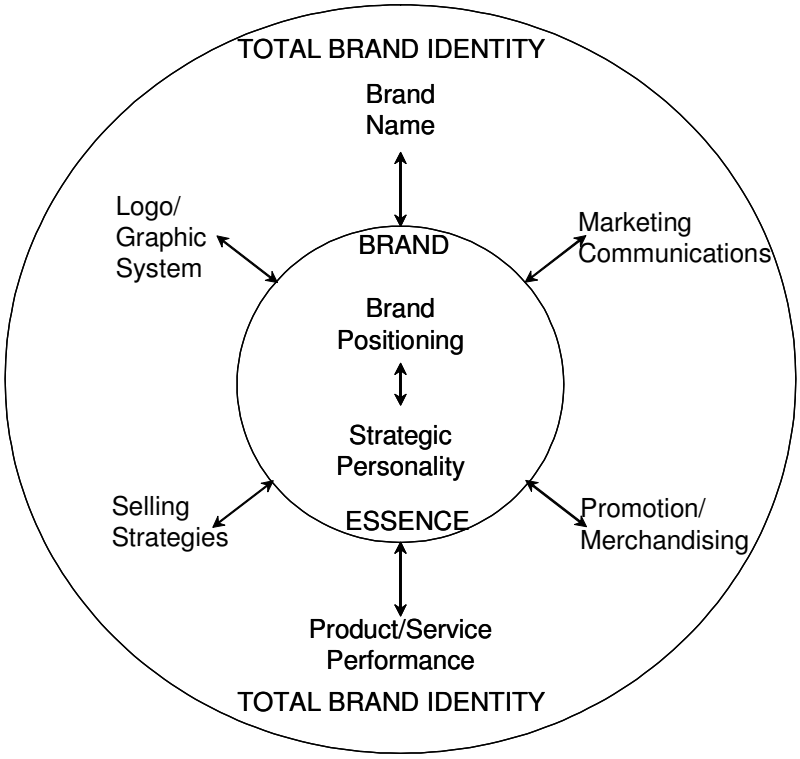


Figure 5-1: The nature and structure of total brand identity
Note: From *Building Brand Identity: A Strategy for Success in a Hostile Marketplace,* by Upshaw, L.B., (1995), New York: John Wiley & Sons, p. 24, Reprinted with permission of John Wiley & Sons, Inc.

5.4 Bridging the Gaps

As Polunin explains (2002: p. 3) "branding starts with self analysis; with understanding and defining the product personality. It then shifts to communicating this personality to the target market… It cannot be fabricated and turned on to please a market because it will soon be found out as false when it fails to deliver." This illustrates that, although branding might be a way to facilitate bridging the gaps, false branding will make things worse.

> Nike and Coke — plain shoes and fizzy drinks — had the advantage of being able to start with a blank sheet of paper on which to create their personalities and to make themselves 'human'. Destinations, however, are very human from the start. They have personalities already moulded and constrained by history and preconceptions. They consist of a broad heterogeneous range of personalities that will cause confusion and are likely to resist being shoehorned into a homogeneous mould. But if branding is to work, there must be a common cause and consensus among stakeholders. The long process of consulting, co-opting, and involving

> stakeholders, followed by distilling from their input the essence of a place's personality, is probably the toughest part of the destination branding exercise (Polunin 2002: p. 3)

5.4.1 Managing the Essence

The essence of the destination brand is well defined by Gnoth (2002). What is required is to "develop sets of shared values, quality standards and pricing signals even in the face of local, regional and national competition among industry participants themselves…. The starting point of the branding activity is the attraction" (Gnoth 2002: p. 270). Gnoth also provides some examples:

> It [the attraction, as in what attracts tourists to the destination] will always have qualities that define it, be they its own features or those that surround it. The features can be described through terms that usually refer to a personality. Tourists' (symbolic) interactions with these attributes become the characteristics of the experience which, in turn, define qualities of services that support the experience. For example, a large part of the experience of destination New Zealand is typified by the outdoors, wilderness, insular weather and agriculture, particularly sheep farming. These features translate into service experiences of human warmth, rugged but cosy surroundings, simplicity, hardiness, independence and peace. The experience of, say, urban France may be characterised by sophistication, relaxed style, *laissez faire* [italics in original] and indulgence. These attributes that emerge from the interplay of people in their environment form part of the attraction as well as attributes of the brand. Branding the attraction is the first level of destination branding activity. [The primary brand is then extended to the essential supporting tourism services.] The network of each service industry helps shape the service delivery channel and the final service product through both tangibles and intangibles. A hotel, for example, is built from materials that are supplied from quarries, timber yards and manufacturers of hotel fittings and furnishers. Likewise, tour operators may be using tour buses or boats built in the country and restaurants provide food supplied by local produce markets…. Extending the brand to essential services is the second level of branding, while extending it to the directly supporting primary and secondary industries is the third. Products and services involved here relate to food grown and processed in the country, including wine, but also technological products such as snow skis and ski lifts (Gnoth 2002: p. 270-271).

"The results are numerous opportunities for the generation of unique experiences that are associated with uniquely presented (branded) products and services" (Gnoth 2002: p. 273). Go (2003: p. 26) suggests several other ways in which to use experience marketing to co-opt customers in the brand story through symbols and rituals. The first and simplest way is to buy off-the-shelf stories, for instance by sponsoring athletes, popular culture or a formula 1 team (such as Dubai is doing). Alternatively, a second approach could be to organise events on location. The Camel trophy is a good example, but travelling museum exhibitions might be a good alternative for destinations. A third possibility lies in the realisation that the brand story could in fact be propagated by customers themselves, such

as in the example of Harley Davidson. A fourth alternative is to create a (virtual) community where customers and partner organisations can get involved in the composition of the brand story (Van het Klooster et al. 2004). Creating such a virtual community is not as easy as some of the popular marketing literature might suggest (Valck 2003: p. 5). The creation of a virtual community is a complex business. One cannot force the birth of a community, one can only feed it. However, the way in which communities can be fed is currently being revolutionised as will be discussed in the next section.

But also the role of festivals and events in promoting place identity has been acknowledged (Jeong & Almeida Santos 2004; Kotler et al. 1993). In the case of Dubai, the shopping festivals and particularly the Ramadan festival and Eid and national day celebrations, have been important vehicles for representing Dubai's distinctiveness as a regional centre for leisure, tourism and entertainment, but at the same time always heavily promoting its national heritage and Arab culture. As discussed, one of the centres of activity during these festivities is always the Heritage Village, a place where (emergent) authentic local culture can still be witnessed. However, as illustrated in chapter 3, this is generally not acknowledged by the travel and hospitality industries, who seem to prefer to sell what they know; the traditional see-sun-sand destination. Hence, the potential value of including festivals in a well orchestrated branding strategy. A challenge however, would be to export these popular events abroad, in order to involve potentially interested consumers pre-visit and to create a real attachment with the destination, even before one has travelled there. Examples are, of course, the World Expos, Chinese New Year celebrations around the world, and embassy involvement in themed cultural events whenever possible.

5.4.2 Managing Narratives and Communications

If destinations want to maintain their image in future, communication will become increasingly important. With technology, information space is expanding at light-year speed and getting one's message across to the right consumer at the right time will be essential. The same technology will be able to facilitate that though and destinations need to start preparing themselves to be able to manage their narratives and consistently project the same images through the right channels, but in a flexible customised manner. This can be done through content management systems (Valck 2003).

Content management is a method aimed at the collection, coordination, control and dissemination of information in targeted online channels, in an integrated and flexible manner. Information is linked and organised to form a consistent narrative through the use of meta-data. Additionally, the use of meta-data allows for users to customise their application of the information (Valck 2003: p. 26). Meta-data is basically data about data, such as author, title, date created, subject and key-words. "Meta data describes how and when and by whom a particular set of data was collected, and how the data is formatted. Meta data is essential for understanding [and processing] information stored in data warehouses" (www.webopedia.com/TERM/M/meta_data.html). On the internet, the technology used is RDF, short for Resource Description Framework.

RDF is a general framework for describing a Web site's metadata, or the information about the information on the site. It provides interoperability between applications that exchange machine-understandable information on the Web. RDF details information such as a site's sitemap, the dates of when updates were made, keywords that search engines look for and the Web page's intellectual property rights. Developed under the guidance of the World Wide Web Consortium, RDF was designed to allow developers to build search engines that rely on the metadata and to allow Internet users to share Web site information more readily. RDF relies on XML as an interchange syntax, creating an ontology system for the exchange of information on the Web (http://www.webopedia.com/TERM/R/RDF.html).

But to share the content of data warehouses with consumers, in today's information overloaded society, is the most challenging part of the narrative management and communication processes. Just having a website will not be enough in future. Of course, for consumers who have already positioned a destination in their action-set (see section 2.4.2) and are actively searching for detailed information, the increasingly rich site content of DMOs will come in very useful. However, destinations should want to create a strong and consistent brand and manage diversity of perceptions across the whole population, regardless of which phase of the destination choice process a consumer is in, or in what choice set the destination is placed. In fact, one would preferably want to try to achieve a more favourable positioning. In the early phases of the consumers' decision-making process or with consumers with low levels of awareness, this is probably not done through the destination's own website. More likely, the media, intermediaries and cybermediaries, virtual travel communities and portals will have a large influence on this process (Magala 2001). So how to push one's content and consistent communications through these channels? The latest internet technology of RSS feeds might be promising.

RSS, short for RDF Site Summary or Rich Site Summary, an XML format for syndicating web content, is potentially the way to move forward (Syndicating is the sharing of content among different websites. "The term is normally associated with licensed content such as television programs and newspaper columns"(http://www.webopedia.com/TERM/S/-syndication.html)). "A website that wants to allow other sites to publish some of its content creates an RSS document and registers the document with an RSS publisher. A user that can read RSS-distributed content [feeds] can use the content on a different site. Syndicated content includes such data as news feeds, events listings, news stories, headlines, project updates, excerpts from discussion forums or even corporate information" (http://www.webopedia.com/TERM/R/RSS.html). Even blog-content can be fed into RSS, making mass consumer to consumer communication even more accessible, further encouraging active bloggers (Blog is short for "Web-log, a blog is a Web page that serves as a publicly accessible personal journal for an individual [the blogger]. Typically updated daily, blogs often reflect the personality of the author" (http://www.webopedia.com/-TERM/b/blog.html). See for instance www.bloglines.com). When Yahoo! introduced RSS-feeds on their redesigned personalised My Yahoo! pages in late September 2004, RSS seemed to have gone mainstream. Nearly 150 million active registered My Yahoo! users (Ichinose 2004) now have access to "over 150,000 sources spanning the Web…. The company also allows users to add a custom search feed for any search terms from Yahoo! Search" (Parker 2004). It is believed that MSN and America Online will soon follow suit (Rodgers 2004). Numerous publishers of scale have also started to use syndicated feeds to

grow their audience. “NYTimes.com, for one, is reporting just under two million monthly page views based on click-throughs from its feeds (Rodgers 2004).

This technology would allow DMOs to manage content all the way through to the consumers’ desktops and mobile devices, supporting a strong branding strategy and management of diverse perceptions. Combined with other technologies such as provided through ambient intelligence, that would allow for completely customised but consistent content feeding and customer communication. Ambient Intelligence was already prophesised by Toffler in 1980 when he introduced the concept of the “intelligent environment”. It is based on the premise that all consumer electronics, even the most inexpensive devices are becoming intelligent with embedded computing power. Such as today, where mobile devices, cars, refrigerators and other appliances have the capacity to process information, in future even clothes, or ultimately our body will have embedded intelligence. Then, if fixed and mobile communication could be integrated in a seamless way; if these devices could be linked to this basic infrastructure and embed in their surroundings; if value added services could be incorporated; and if these could be setup in such a way that they could be made to understand the people they serve, the world of ambient intelligence would have been created. “Such a world may be conceived as a huge distributed network consisting of thousands of embedded systems that support users with easy, intelligent and meaningful interaction, that satisfy their personal needs for information, communication, navigation, and entertainment” (Loonstra et al. 2004: p. 96).

What it does is that it will allow “the network stakeholders to sense and respond to individual customers’ expectations and take measures that provide exclusive access to any source of information, at any place and time, resulting in increased purchase volumes and user loyalty” (Loonstra et al. 2004: p. 96). But, of course, if customers’ locations, expectations, connectedness and profiles are known, it provides great opportunities to push customised and balanced information as well. This would allow destinations to narrate their story and communicate this in a customised way, dealing with, but at the same time leveraging, diverse perceptions. As an example for Dubai: it would not matter that large resorts attempt to ‘recruit’, ‘sign up’ and ‘lock up’ customers within the boundaries of their holiday bubbles encapsulated in global flows (see chapter 3). An ambient intelligent world would recognise a traveller on arrival, possibly even before, and if the traveller were to be identified, not as a see-sun-sand devotee, but as a potentially culturally or otherwise interested tourist, the DMO could try to use push technology to encourage the person to break away from their bubble and learn more about the destination as a whole. A richer experience and hence a stronger destination brand could ensue. In 1980 Toffler saw an emerging trend towards de-massification of the media, which would result in a ‘blip culture’, where fewer and fewer people seek the larger picture. The over-supply of information has caused people to settle for "blips" of information, which they then attempt to string together in a sensible manner to account for changes in their environment. Over the last decade or so, through the expansion of the internet and the rapid diffusion of technology, this trend has firmly developed into today’s blip culture. However, in future, the same technology supported through ambient intelligence, might just be the antidote to its own ‘negative side-effects’. Connected computers “can sift vast masses of data to find subtle patterns. It can help assemble "blips" into larger, more meaningful wholes” (Toffler 1980: p. 174).

5.4.3 Managing Performance through Stakeholders

"Brands need to be managed and controlled. It thus becomes a focal issue as to who controls and manages a country brand, especially if its potential national brand extensions – the service providers together with their potential partners from primary and secondary industries – lack community, vision and control" (Gnoth 2002: p. 267). "Consulting, co-opting, and involving stakeholders, followed by distilling from their input the essence of a place's personality, is probably the toughest part of the destination branding exercise" (Polunin 2002: p. 3), but it will be essential for bridging the Tourism Development Strategy gap. This is illustrated by Jeong and Almeida Santos (2004) who studied the cultural politics of festivals and the political nature of place identity, where they found that dominant groups can use such vehicles to consolidate their privileged social status by including and excluding other groups in the construction of regional identity. Of course, this is not a desirable situation and will eventually collapse in the face of globalisation. It is important that everyone is heard and that all stakeholders, interest groups and layers of society are involved.

Kitchin (2003: p. 19) supports this notion that it is the people who create the brand. He comments on the proposition that organisations can attach authenticity to brands when he states that "authenticity cannot be attached to brands any more than humanity can. People attach themselves to people"…and… "people love people, not soap powder" (when referring to so called lovemarks). Some contend that destination brand communities are the way forward (Gnoth 2002; Van het Klooster et al. 2004). Also Van Rekom (1994a; 1994b) argues that the people on the shop floor; the employees of all the businesses and organisations involved in delivering the tourism product, are of crucial importance. Within a corporate communication context he argues that the whole tourism production chain should be involved in communicating the brand mentality and all men and women involved should share the same values and goals that differentiate the destination.

Nevertheless, as Polunin rightfully argues, this is a very complicated process. As he later states (2002: p. 5): in many existing branding cases "the emotional gap, between product personality and customer feeling, does not appear to have been bridged" (one might notice the parallel between this statement and the gap between the tourism product offering and perceived destination image as presented in this dissertation). Anholt (2002: p. 234) not only explains how branding might help to improve the tourism product, but at the same time how tourism might help in "branding the nation…, by encouraging first-hand experience of the country through tourism". Furthermore Anholt argues that: "just as corporate branding campaigns, if properly done, can have a dramatic effect on the morale, team spirit and sense of purpose of the company's own employees, so a proper national branding campaign can unite a nation in a common sense of purpose and national pride" (2002: p. 234).

This will help in bridging the Tourism Delivery and Supply gap, as it will guide the tourism sector and its employees in delivering the right product in the right way. Anholt stresses the great importance of national culture as part of the branding exercise, as it is "irreplaceable and uncopiable because it is uniquely linked to the country itself; it is

reassuring because it links the country's past with its present; it is enriching because it deals with non— commercial activities; and it is dignifying because it shows the spiritual and intellectual qualities of the country's people and institutions" (Anholt 2002: p. 236).

What is needed is the creation of a 'community of practice', in which people learn at the intersection of community, social practice, meaning and (cultural) identity (Wenger 1998). "Communities of practice come together around common interests and expertise – whether they consist of first-line managers or customer service representatives, neurosurgeons or software programmers, city managers or home-improvement amateurs. They create, share and apply knowledge within and across the boundaries of teams, business units, and even entire companies – providing a concrete path toward creating a true knowledge organisation" (Wenger et al. 2002: p. cover). An example of a typical community of practice, relevant to the research context of Dubai, is the traditional *majlis*, still common today in the Gulf States (see section 3.1.1). As an institution where common interests can be discussed by people from different walks of life and from different stakeholder groups, the *majlis* seems to be the perfect example of a community of practice that has sustained over time, while in Western society these sort of traditional cultural foundations have disappeared (Wenger et al. 2002: p. 5). As Wenger et al. suggest, we need to cultivate our communities of practice as a ways to consult, co-opt and involve stakeholders and create common ground (based on the creation, sharing and application of common knowledge). The brand community, as first suggested by Gnoth (2002) and later Van het Klooster et al. (2004), indeed seems to be a promising concept for fruitful application in the tourism context.

"It is not communities of practice themselves that are new, but the need for organisations to become more intentional and systematic about 'managing' knowledge, and therefore to give these age-old structures a new, central role in the business" (Wenger et al. 2002: p. 6). "For it is only through value-oriented, networked cooperatives and shared vision that a tourism brand community can evolve. A tourism brand community is here understood as a heterogeneous group of service producers who give a sense of homogeneity of experience to tourists through employing the same brand attributes during service production"(Gnoth 2002: p. 269). Van het Klooster et al. (2004) approach brand communities as distributed community-based knowledge initiatives (Wenger et al. 2002: Chapters 6 & 9) and discuss their requirements based on Wenger, from a poly-inclusive perspective. "The success of the destination brand community depends on the commitment and development of shared vision between the different stakeholders. This is a difficult process since all stakeholders operate in their own local context, holding different values and perspectives and only limited resources to interact with other stakeholders and develop a common ground, that is to say, a sense of community" (Van het Klooster et al. 2004: p. 12). In mind space, "to provide value for participation, the identity of the destination brand community should be closely aligned with strategic priorities of the different stakeholders" (Van het Klooster et al. 2004: p. 14 & 124; Wenger et al. 2002: p. 217).

> A strong community fosters interactions and relationships based on mutual respect and trust. Social space refers to the development of interpersonal relationships that reinforce commitment and trust between individuals. Reciprocity is of major importance within a community. Without it, the

> community is unlikely to sustain…. The levels of participation are very organic as stakeholders are constantly evaluating their goals and looking for new ways in which the community can contribute to their individual needs and those of the collective. Rather than force participation, successful communities 'build benches' for those on the sidelines, for example through a (digital) newsletter or website with the latest news [as well as private spaces for personal networking] (Van het Klooster et al. 2004: p. 16; Wenger et al. 2002: p. 57 & 133).

"Information space is able to support both social and mind space. By putting community related information on the internet (as website content or database documents), members can catch up with the latest news whenever they want…. Discussionboards and who-does-what facilities make dispersed 'invisible' members visible, bringing the community alive in an online environment" (Van het Klooster et al. 2004: p. 16; Wenger et al. 2002: p. 127). "Material space facilitates gatherings where the community members can communicate face-to-face with each other. Face-to-face contact is the richest form of communication, providing space for stakeholders to build trust and share complex knowledge through (informal) discussions, and brainstorm sessions" (Van het Klooster et al. 2004: p. 17; Wenger et al. 2002: p. 130). Through well cultivated brand communities it is hoped that destinations can build sustainable brand identities, create meaning and generate the knowledge that can be managed through the processes discussed in the last section. "In other words, the required network structures to be formed in the industry to sustain a branding exercise need to develop a brand community that creates communication and interaction patterns which overcome the lack of a powerful channel captain" (Gnoth 2002: p. 277).

Maathuis (1999: p.229) discusses how a corporate brand can be transferred to business units and products. When destination brands prove to have the same properties as a trade brand, it would be an interesting issue to address the 'transmittability' of such brands in a tourism context. Could the brand community create not only a strong branding for the destination, but at the same time facilitate the 'transmittability' of this brand onto the various stakeholders and value chain members, as suggested by Gnoth? Whatever the case, if a DMO is able to formulate a compelling and comprehensive brand story, which mobilised all (or many) of its emotional, multisensory and fantastic elements based on the destination's identity, it should:

- Facilitate in projecting the right destination image through marketing communication;
- Direct the creation of the right tourism product offering, particularly the way it is delivered by guiding the stories that hosts share with guests, and;
- Exploit the value of positive word of mouth/mouse by providing subconscious or real cues that create common stories for consumers to share.

Hence this would help to bridge the three TDS-gaps as discussed.

5.5 General Conclusion & Contributions

This dissertation has suggested a new model which conceptualises the dynamic process of tourism destination image formation. It presented this from a 3-gap perspective; three ways in which the level of satisfaction experienced in the host – guest encounter between culturally diverse groups, might be affected. In terms of perceived destination image, it has

been stated that many academics have acknowledged the relevance of this research area in the past, and have tried to measure destination image applying multi-attribute systems, using quantitative common measurement scales (Echtner & Ritchie 2003; Gallarza et al. 2002). However, chapter 4 proved these traditional multi-attribute systems to be incapable of measuring differences in destination image among different groups of consumers that show unequal levels of destination preference (i.e. based on this method, tourists that visit a destination regularly, do not report a different perceived image of that destination, compared to non-visitors). Therefore, multi-attribute approaches on their own seem to be inadequate in measuring destination image or visitors' ratings of tourism destinations and alternative methods should be evaluated. As a result we were compelled to agree with current thought in literature (Padgett & Allen 1997; Tapachai & Waryszak 2000) which concludes that the narrative mode of thought may be more promising than those of the paradigmatic mode of thought. In a supplementary study, we used open-ended free elicitation of tourists' stories about destinations and applied neural network based computerised content analysis procedures to generate the results. These proved to be satisfactory and capable of solving some of the issues related to common attribute scales, but for future research a combination of the two approaches are most likely to yield the best results.

In terms of projected destination image, we used content analysis of pictures and text to analyse online marketing communications of 20 Dubai based websites, including the majority of the most influential actors in the various tourism sectors. The research found that most imagery is product based, showing facilities and activities. The experiential nature of tourism is largely unrecognisable. Representation of the identity of place, its culture and heritage is left to government, the DMO and tour operators. This could be a typical example of a Tourism Development Strategy gap, which in turn leads to a Tourist Demands Specification gap, as consumers create confused perceived destination images, based on inconsistent projected destination images. This was confirmed in our analysis of perceived image, as perceptions are primarily stereotypical and lack reference to the unique elements of identity of destination Dubai. Lastly, different actors in the local tourism industry are apparently delivering their services according to different scripts, which is fertile ground for a tourism delivery and supply gap to occur. The fact that the tourism industry in Dubai is almost completely operated and managed by expatriate workers and executives is catalytic to this process. In summary, our research has been able to identify the gaps and illustrate their nature within the research context of Dubai. The relevance of cultural differences and changing perceptions according to social, personal and psychological characteristics has also been confirmed.

This chapter has argued that the gravity and frequency of such instances in which the three gaps are exposed, can be reduced through thorough destination branding. First of all, branding is a process of soul searching. The DMO, in consultation with government and private industry actors, should formulate the identity of the place, or strategic personality. From this, a coherent tourism product offering should be assembled including a communications strategy which includes consistent narratives, supported by visuals and slogans. This facilitates a process in which the projected tourism destination image is consistent and in line with reality, bridging the tourism development strategy gap. If, apart from paid advertising, good use is made of covert induced agents, this can help in bridging

the tourist demands specifications gap, as perceived destination images will create the right expectations. Finally, as industry is involved in the process and the projected image should be in line with the identity of the place, front line employees will hopefully be united and guided in their daily interaction with tourists. This, of course, supported by appropriate brand related selling strategies, service performance standards, a process of co-opting customers and promotion activities, helps to bridge the tourism delivery and supply gap. The way in which to measure the success of these strategies in bridging the image gaps and to what extent these assumptions about the usefulness of branding hold true, is an important and fertile area for future research.

The contributions made by our research, cover two specific domains. First of all, the innovative methodology of computerised content analysis based on neural network technology, that has been applied both to the analysis of online projected image, as well as the analysis of qualitative survey data, proved to generate good results. It opens up opportunities for future research in many areas. It also proved to be useful for identifying unique attributes of destination image at the same time, while traditional methodologies based on attribute scales have major limitations in that respect. On the other hand common characteristics across destinations were also identified and our methodology proved to be incapable of measuring relative preference of destinations on the bases of such common attributes. Therefore, we suggest that a progression towards a standardised destination image measurement methodology should be based on the combination of both these methodologies.

Second, we have contributed to the formulation of a generic but dynamic tourism destination image formation model. All the relationships suggested in the model, based on literature review and integration in chapter 2, proved to be identifiable in the empirical results. Hence, the model is now grounded in (quantified) qualitative data. Future research can now concentrate on establishing causal relationships statistically as far as that has not yet happened in literature.

When it comes to suggesting generalisations based on the actual content of the results, we recommend caution. Major conclusions on the nature of the gaps for destination Dubai, as presented at the beginning of this chapter, will be of interest to similar rapidly developing destinations in the Orient, but are obviously hard to generalise. For instance, the discontinuity between private and public sector projected images is clearly an issue in Dubai. Although we expect that this will be the case in many destinations, our research does not provide firm proof of that. Also, the intercultural issues identified in the perceived image, such as the misperceptions in the West on the nature of Muslim society in Dubai, will be of interest to similar destinations, but cannot be automatically generalised. However, we need to emphasise that it was and is not our intention to be able to provide universal results on the nature of the gaps. Our intention was, and our contribution is, to be able to identify *if* there are gaps and *how* these can be identified, without limiting ourselves to the unsatisfactory methodologies that have been applied in literature thus far. The case of Dubai, was a means to an end for establishing the model's relationships, which can only be achieved embedded in context. Although the specific content of this context might be of interest to the destination involved and other similar rapidly developing regions or city-states in the Orient, it is not of concern to the general progression of science within this

research area. Scientifically, it is not the content of the findings that is of interest here. What does constitute our contribution to the body of knowledge in this area of research in general is the fact that we have been able to produce these finding, our ability to identify gaps and the way in which we have done that.

We hope that in that small way we have also contributed to society in general, as destinations might get a better understanding of the complexity involved in destination marketing and image formation. Purely rational approaches to strategic marketing management and the application of information and communication technology are insufficient. Moreover, to consider the consumer to be a purely rational decision-maker is a fallacy as well. If destinations want to bridge their gaps and make sure that customer satisfaction and a fulfilling host-guest encounter prevail, they have to build trust, include elements of social awareness in their image projections and behave in line with who and what they really are, or build uniqueness based on identity. In other words, they have to become more human.

APPENDIX I: SURVEY CONTENT ANALYSIS PROCEDURE

The following appendix reports of the procedure used to conduct the analysis of the responses to the free elicitation open ended questions in the survey hosted on Travellerspoint.

As a first step, all the text was checked for correct spelling.

Subsequently, seven text files were created, one for each destination, which included all responses for that particular destination. The survey did not generate enough responses (32) for The Netherlands and hence that destination was excluded from the analysis.

A first word frequency analysis was processed using the standard CATPAC exclude file. For each destination, the 160 (maximum capacity of CATPAC) most frequently used words were identified in the total of responses. Based on these lists, several recodes were conducted. If plurals and singles of the same word appeared, plurals were changed to singles. Words with similar meaning were recoded to one standard. In that way, for instance the following recodes were incorporated:

- HIGH BUILDINGS, ARCHITECTURE and SKYSCRAPERS became BUILDING;
- WARM WEATHER, WARM CLIMATE, GOOD WEATHER and HEAT became HOT;
- BAD WEATHER, RAINS and RAINY became RAIN;
- SEA became WATER;
- WEALTH and WEALTHY became RICH;
- DUNES became DESERT;
- DISNEYLAND and DISNEYWORLD became DISNEY;
- HISTORICAL became HISTORY.

This procedure was repeated several times until the lists of top-160 most frequently used words stabilised.

Subsequently, for the top forty most frequently used words in responses for each destination, commonality across destinations was checked. The idea was that words that did not immediately reflect a particular meaning and were common across destinations, would not yield any particular descriptive image component of specific destinations. Such words, if they appeared in the top-40 lists of at least four out of the seven destinations, were incorporated in the CATPAC exclude file. This was done with the following words:

- AROUND
- BEAUTIFUL
- CITY
- EXPECT
- FIND
- FIRST
- KNOW
- LITTLE
- LIFE
- LIVE
- LOCAL
- PEOPLE
- PLACE
- REALLY
- TIME
- TRAVEL
- VISIT

Also references to the specific destinations were added to the exclude list, in order to exclude them from the analysis. Later on, by selecting the specific files for analysis, it would in itself be clear what

destination the analysis was referring to. Hence the following terms were added to the exclude list:

- MOROCCO
- MOROCCAN
- DUBAI
- CANARYISLANDS
- FLANDERS
- FLEMISH
- CANARY
- FLORIDA
- SINGAPORE
- NETHERLANDS
- WALES

The above actions were necessary in order to exclude any dominant, non-value adding terms from the analysis. This is important in neural network based text analysis, as otherwise all unique words will seem to be connected through this one dominant term, which in itself does not add to the interpretability of the results. CATPAC builds a network of relationships among words used in the analysis, but if these is a dominant word that is used all the time (for instance, the reference to the destination in question), then everything will appear to be linked. As all other words link to the dominant concept, they also link to each other through the total network of nodes. Hence, different groupings of concepts can not be identified and the analysis yields little useful information. By eliminating the above 'meaningless' words, the remaining words will generate a more descriptive image.

Subsequently the actual analysis of the 7 text files was conducted. Underneath are the results for each destination. Each time words are included in the analysis if they appear in at least 10% of the responses. After a first round of analysis, ORESME, a non-hierarchical clustering tool included in CATPAC was used to identify 'meaningless' words for each destination separately. If words did not at first appear to provide a specific contextual meaning for the destination, they were excluded from further analysis if ORESME generated no connection between such term and the other words in the analysis. For instance the word GREAT appeared in the lists of only three destinations (and hence was not excluded from the start). But this word does not in itself provide any specific meaning. It would only get meaning in context (great weather, great food, great buildings, etc.). However, if ORESME tells us through cluster analysis, that there is no link between the word 'GREAT' and any other concept, then it is best to exclude that word altogether, as it would not add to the interpretability of the results. In that way several words were identified for each destination specifically. This is reported in the following sections. If, after the final analysis, there were still words included of which the meaning was not completely apparent, the TestSTAT Search/Concordance tool was used to read the full context of the specific parts of the responses in which the words were used. This is a useful means through which to gain an enhanced understanding of results. Sometimes this led to additional specifications of the particular meaning of words, while in other cases words were still excluded from further analysis if the meaning appeared to be ambiguous and non value-adding. This is also reported underneath.

Dubai

Frequency list using common exclude file:

TOTAL WORDS	4283	THRESHOLD	0.000
TOTAL UNIQUE WORDS	31	RESTORING FORCE	0.100
TOTAL EPISODES	598	CYCLES	1
TOTAL LINES	2865	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	310	7.2	190	31.8
DESERT	222	5.2	152	25.4
HOTEL	222	5.2	161	26.9
HOT	216	5.0	171	28.6
BUILDING	207	4.8	155	25.9
SHOP	204	4.8	149	24.9
ARAB	200	4.7	147	24.6
CULTURE	200	4.7	162	27.1
WORLD	200	4.7	148	24.7
MODERN	174	4.1	142	23.7
RICH	171	4.0	135	22.6
NEVER	139	3.2	126	21.1
DIFFERENT	132	3.1	90	15.1
EXPERIENCE	132	3.1	103	17.2
WOMAN	131	3.1	85	14.2
GREAT	123	2.9	94	15.7
LUXURY	109	2.5	95	15.9
SMELL	102	2.4	79	13.2
WATER	94	2.2	78	13.0
WONDERFUL	92	2.1	75	12.5
MIDDLEEAST	91	2.1	78	13.0
MUSLIM	91	2.1	65	10.9
FEEL	90	2.1	73	12.2
UAE	88	2.1	72	12.0
STREET	85	2.0	66	11.0
BEACH	84	2.0	69	11.5
LOOK	84	2.0	71	11.9
MARKET	84	2.0	76	12.7
SAND	83	1.9	65	10.9
OIL	65	1.5	58	9.7
CAMEL	58	1.4	55	9.2

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
ARAB	200	4.7	147	24.6
BEACH	84	2.0	69	11.5
BUILDING	207	4.8	155	25.9
CAMEL	58	1.4	55	9.2
COUNTRY	310	7.2	190	31.8
CULTURE	200	4.7	162	27.1
DESERT	222	5.2	152	25.4
DIFFERENT	132	3.1	90	15.1
EXPERIENCE	132	3.1	103	17.2
FEEL	90	2.1	73	12.2
GREAT	123	2.9	94	15.7
HOT	216	5.0	171	28.6
HOTEL	222	5.2	161	26.9
LOOK	84	2.0	71	11.9
LUXURY	109	2.5	95	15.9
MARKET	84	2.0	76	12.7
MIDDLEEAST	91	2.1	78	13.0
MODERN	174	4.1	142	23.7
MUSLIM	91	2.1	65	10.9
NEVER	139	3.2	126	21.1
OIL	65	1.5	58	9.7
RICH	171	4.0	135	22.6
SAND	83	1.9	65	10.9
SHOP	204	4.8	149	24.9
SMELL	102	2.4	79	13.2
STREET	85	2.0	66	11.0
UAE	88	2.1	72	12.0
WATER	94	2.2	78	13.0
WOMAN	131	3.1	85	14.2
WONDERFUL	92	2.1	75	12.5
WORLD	200	4.7	148	24.7

ORESME Analysis lead to the exclusion of the following words:

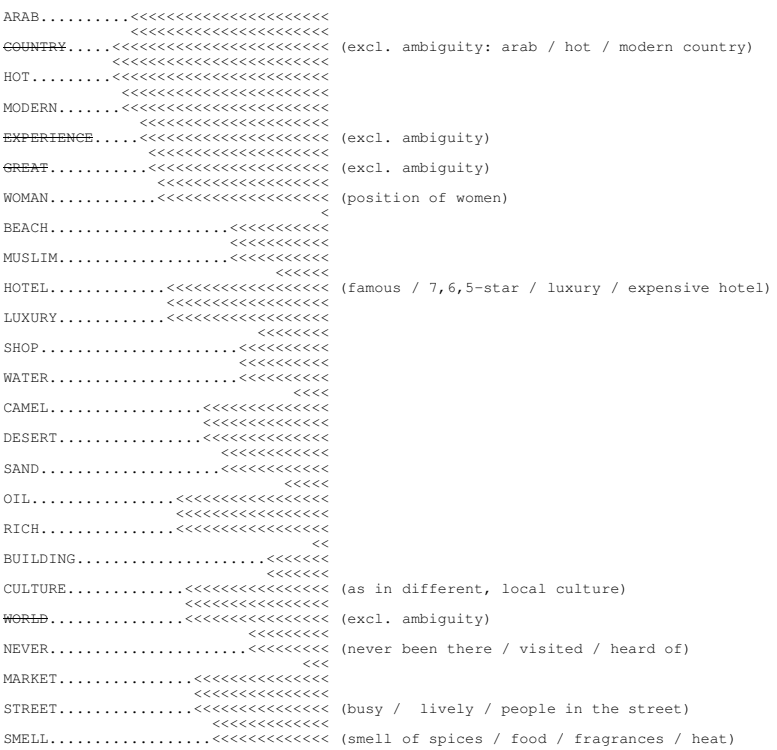
- DIFFERENT
- FEEL
- LOOK
- MIDDLE-EAST
- UAE
- WONDERFUL

Final Analysis

TOTAL WORDS	3706	THRESHOLD	0.000
TOTAL UNIQUE WORDS	25	RESTORING FORCE	0.100
TOTAL EPISODES	598	CYCLES	1
TOTAL LINES	2865	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST					ALPHABETICALLY SORTED LIST				
WORD	FREQ	PCNT	CASE FREQ	CASE PCNT	WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	310	8.4	190	31.8	ARAB	200	5.4	147	24.6
DESERT	222	6.0	152	25.4	BEACH	84	2.3	69	11.5
HOTEL	222	6.0	161	26.9	BUILDING	207	5.6	155	25.9
HOT	216	5.8	171	28.6	CAMEL	58	1.6	55	9.2
BUILDING	207	5.6	155	25.9	COUNTRY	310	8.4	190	31.8
SHOP	204	5.5	149	24.9	CULTURE	200	5.4	162	27.1
ARAB	200	5.4	147	24.6	DESERT	222	6.0	152	25.4
CULTURE	200	5.4	162	27.1	EXPERIENCE	132	3.6	103	17.2
WORLD	200	5.4	148	24.7	GREAT	123	3.3	94	15.7
MODERN	174	4.7	142	23.7	HOT	216	5.8	171	28.6
RICH	171	4.6	135	22.6	HOTEL	222	6.0	161	26.9
NEVER	139	3.8	126	21.1	LUXURY	109	2.9	95	15.9
EXPERIENCE	132	3.6	103	17.2	MARKET	84	2.3	76	12.7
WOMAN	131	3.5	85	14.2	MODERN	174	4.7	142	23.7
GREAT	123	3.3	94	15.7	MUSLIM	91	2.5	65	10.9
LUXURY	109	2.9	95	15.9	NEVER	139	3.8	126	21.1
SMELL	102	2.8	79	13.2	OIL	65	1.8	58	9.7
WATER	94	2.5	78	13.0	RICH	171	4.6	135	22.6
MUSLIM	91	2.5	65	10.9	SAND	83	2.2	65	10.9
STREET	85	2.3	66	11.0	SHOP	204	5.5	149	24.9
BEACH	84	2.3	69	11.5	SMELL	102	2.8	79	13.2
MARKET	84	2.3	76	12.7	STREET	85	2.3	66	11.0
SAND	83	2.2	65	10.9	WATER	94	2.5	78	13.0
OIL	65	1.8	58	9.7	WOMAN	131	3.5	85	14.2
CAMEL	58	1.6	55	9.2	WORLD	200	5.4	148	24.7

WARDS METHOD



Canary Islands

Frequency list using common exclude file:

TOTAL WORDS	347	THRESHOLD	0.000
TOTAL UNIQUE WORDS	21	RESTORING FORCE	0.100
TOTAL EPISODES	62	CYCLES	1
TOTAL LINES	290	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
ISLAND	45	13.0	24	38.7
BEACH	38	11.0	30	48.4
WATER	30	8.6	20	32.3
SPAIN	21	6.1	14	22.6
SUN	19	5.5	15	24.2
DAY	17	4.9	12	19.4
HOT	17	4.9	16	25.8
NICE	17	4.9	12	19.4
TOURIST	15	4.3	13	21.0
SMALL	14	4.0	10	16.1
FEW	13	3.7	10	16.1
HOTEL	12	3.5	11	17.7
SAND	12	3.5	10	16.1
PROBABLY	11	3.2	8	12.9
WEATHER	11	3.2	10	16.1
CULTURE	10	2.9	8	12.9
BLUE	9	2.6	7	11.3
DOWN	9	2.6	7	11.3
NATURE	9	2.6	6	9.7
NIGHT	9	2.6	7	11.3
PALM	9	2.6	7	11.3

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEACH	38	11.0	30	48.4
BLUE	9	2.6	7	11.3
CULTURE	10	2.9	8	12.9
DAY	17	4.9	12	19.4
DOWN	9	2.6	7	11.3
FEW	13	3.7	10	16.1
HOT	17	4.9	16	25.8
HOTEL	12	3.5	11	17.7
ISLAND	45	13.0	24	38.7
NATURE	9	2.6	6	9.7
NICE	17	4.9	12	19.4
NIGHT	9	2.6	7	11.3
PALM	9	2.6	7	11.3
PROBABLY	11	3.2	8	12.9
SAND	12	3.5	10	16.1
SMALL	14	4.0	10	16.1
SPAIN	21	6.1	14	22.6
SUN	19	5.5	15	24.2
TOURIST	15	4.3	13	21.0
WATER	30	8.6	20	32.3
WEATHER	11	3.2	10	16.1

ORESME Analysis lead to the exclusion of the following words:

- FEW
- PROBABLY
- SMALL

TOTAL WORDS	314	THRESHOLD	0.000
TOTAL UNIQUE WORDS	18	RESTORING FORCE	0.100
TOTAL EPISODES	62	CYCLES	1
TOTAL LINES	290	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
ISLAND	45	14.3	24	38.7
BEACH	38	12.1	30	48.4
WATER	30	9.6	20	32.3
SPAIN	21	6.7	14	22.6
SUN	19	6.1	15	24.2
DAY	17	5.4	12	19.4
HOT	17	5.4	16	25.8
NICE	17	5.4	12	19.4
TOURIST	15	4.8	13	21.0
SMALL	14	4.5	10	16.1
HOTEL	12	3.8	11	17.7
SAND	12	3.8	10	16.1
WEATHER	11	3.5	10	16.1
CULTURE	10	3.2	8	12.9
BLUE	9	2.9	7	11.3
DOWN	9	2.9	7	11.3
NATURE	9	2.9	6	9.7
NIGHT	9	2.9	7	11.3

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEACH	38	12.1	30	48.4
BLUE	9	2.9	7	11.3
CULTURE	10	3.2	8	12.9
DAY	17	5.4	12	19.4
DOWN	9	2.9	7	11.3
HOT	17	5.4	16	25.8
HOTEL	12	3.8	11	17.7
ISLAND	45	14.3	24	38.7
NATURE	9	2.9	6	9.7
NICE	17	5.4	12	19.4
NIGHT	9	2.9	7	11.3
SAND	12	3.8	10	16.1
SMALL	14	4.5	10	16.1
SPAIN	21	6.7	14	22.6
SUN	19	6.1	15	24.2
TOURIST	15	4.8	13	21.0
WATER	30	9.6	20	32.3
WEATHER	11	3.5	10	16.1

WARDS METHOD

```
BEACH....<<<<<<<<<<<<<<<<<<
         <<<<<<<<<<<<<<<<<<
SPAIN....<<<<<<<<<<<<<<<<<<
          <<<<<<<<<<<<<<<<<
SUN.......<<<<<<<<<<<<<<<<<
           <<<<<<<<<<<<<<<<
~~NICE~~.......<<<<<<<<<<<<<<<< (excl. ambiguity: nice beach, nice sun, nice weather)
            <<<<<<<<<<<<<<<
~~DOWN~~........<<<<<<<<<<<<<<< (excl. ambiguity)
                          <
BLUE.............<<<<<<<<< (blue water  / skies)
                 <<<<<<<<<
SAND.............<<<<<<<<<
                      <<<
CULTURE.............<<<<<< (as in different, local culture)
                    <<<<<<
~~DAY~~..............<<<<<<<< (excl. ambiguity)
                   <<<<<<<<
~~NIGHT~~...........<<<<<<<<<< (excl. ambiguity)
                <<<<<<<<<<
~~SMALL~~...........<<<<<<<<<< (excl. ambiguity)
                  <<<<<<<
HOTEL..............<<<<<<< (comfortable / nice / good / luxurious / fancy hotel)
                       <<
HOT............<<<<<<<<<<<
              <<<<<<<<<<<
~~WEATHER~~........<<<<<<<<<<< (relates to hot)
                     <<<<
ISLAND.......<<<<<<<<<<<<<
            <<<<<<<<<<<<<
WATER........<<<<<<<<<<<<<
                    <<<<<
NATURE........<<<<<<<<<<<<
             <<<<<<<<<<<<
TOURIST.......<<<<<<<<<<<<
```

Flanders

Frequency list using common exclude file:

TOTAL WORDS	863	THRESHOLD	0.000
TOTAL UNIQUE WORDS	28	RESTORING FORCE	0.100
TOTAL EPISODES	142	CYCLES	1
TOTAL LINES	632	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BELGIUM	133	15.4	76	53.5
COUNTRY	46	5.3	29	20.4
CHOCOLATE	44	5.1	31	21.8
BUILDING	39	4.5	32	22.5
GREAT	32	3.7	20	14.1
FRENCH	30	3.5	20	14.1
GOOD	30	3.5	22	15.5
OLD	29	3.4	21	14.8
SMALL	29	3.4	24	16.9
TOWN	29	3.4	16	11.3
CULTURE	28	3.2	22	15.5
LOOK	28	3.2	19	13.4
STREET	28	3.2	21	14.8
ENJOY	27	3.1	21	14.8
HISTORY	27	3.1	22	15.5
SHOP	27	3.1	20	14.1
EUROPE	26	3.0	23	16.2
BEER	23	2.7	17	12.0
NEVER	23	2.7	20	14.1
NICE	23	2.7	21	14.8
TRIP	23	2.7	19	13.4
DAY	22	2.5	15	10.6
FEEL	22	2.5	20	14.1
HOTEL	22	2.5	18	12.7
WORLD	21	2.4	17	12.0
FRIENDLY	18	2.1	16	11.3
CAFE	17	2.0	17	12.0
EXPERIENCE	17	2.0	15	10.6

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEER	23	2.7	17	12.0
BELGIUM	133	15.4	76	53.5
BUILDING	39	4.5	32	22.5
CAFE	17	2.0	17	12.0
CHOCOLATE	44	5.1	31	21.8
COUNTRY	46	5.3	29	20.4
CULTURE	28	3.2	22	15.5
DAY	22	2.5	15	10.6
ENJOY	27	3.1	21	14.8
EUROPE	26	3.0	23	16.2
EXPERIENCE	17	2.0	15	10.6
FEEL	22	2.5	20	14.1
FRENCH	30	3.5	20	14.1
FRIENDLY	18	2.1	16	11.3
GOOD	30	3.5	22	15.5
GREAT	32	3.7	20	14.1
HISTORY	27	3.1	22	15.5
HOTEL	22	2.5	18	12.7
LOOK	28	3.2	19	13.4
NEVER	23	2.7	20	14.1
NICE	23	2.7	21	14.8
OLD	29	3.4	21	14.8
SHOP	27	3.1	20	14.1
SMALL	29	3.4	24	16.9
STREET	28	3.2	21	14.8
TOWN	29	3.4	16	11.3
TRIP	23	2.7	19	13.4
WORLD	21	2.4	17	12.0

ORESME Analysis lead to the exclusion of the following words:

- DAY
- ENJOY
- EXPERIENCE
- GOOD
- GREAT
- LOOK
- NICE
- TRIP

TOTAL WORDS	661	THRESHOLD	0.000
TOTAL UNIQUE WORDS	20	RESTORING FORCE	0.100
TOTAL EPISODES	142	CYCLES	1
TOTAL LINES	632	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

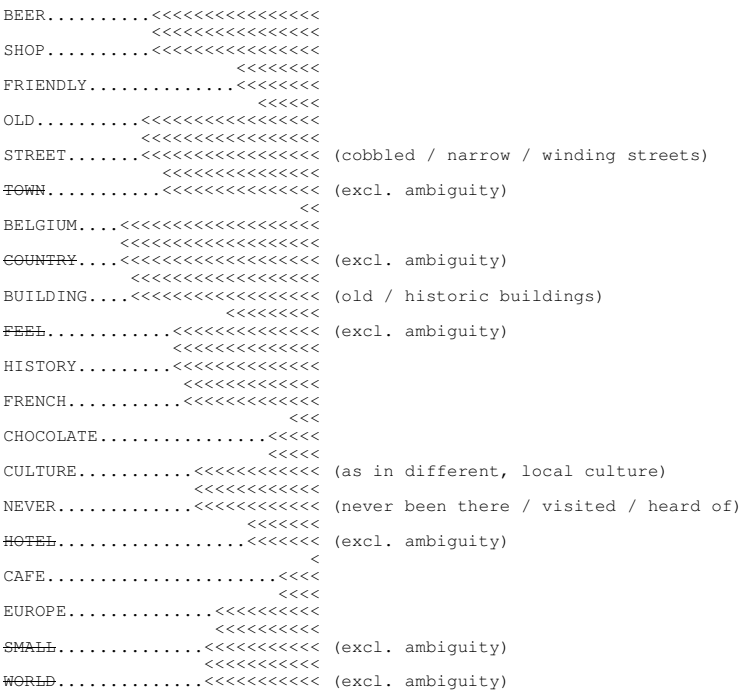
DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BELGIUM	133	20.1	76	53.5
COUNTRY	46	7.0	29	20.4
CHOCOLATE	44	6.7	31	21.8
BUILDING	39	5.9	32	22.5
FRENCH	30	4.5	20	14.1
OLD	29	4.4	21	14.8
SMALL	29	4.4	24	16.9
TOWN	29	4.4	16	11.3
CULTURE	28	4.2	22	15.5
STREET	28	4.2	21	14.8
HISTORY	27	4.1	22	15.5
SHOP	27	4.1	20	14.1
EUROPE	26	3.9	23	16.2
BEER	23	3.5	17	12.0
NEVER	23	3.5	20	14.1
FEEL	22	3.3	20	14.1
HOTEL	22	3.3	18	12.7
WORLD	21	3.2	17	12.0
FRIENDLY	18	2.7	16	11.3
CAFE	17	2.6	17	12.0

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEER	23	3.5	17	12.0
BELGIUM	133	20.1	76	53.5
BUILDING	39	5.9	32	22.5
CAFE	17	2.6	17	12.0
CHOCOLATE	44	6.7	31	21.8
COUNTRY	46	7.0	29	20.4
CULTURE	28	4.2	22	15.5
EUROPE	26	3.9	23	16.2
FEEL	22	3.3	20	14.1
FRENCH	30	4.5	20	14.1
FRIENDLY	18	2.7	16	11.3
HISTORY	27	4.1	22	15.5
HOTEL	22	3.3	18	12.7
NEVER	23	3.5	20	14.1
OLD	29	4.4	21	14.8
SHOP	27	4.1	20	14.1
SMALL	29	4.4	24	16.9
STREET	28	4.2	21	14.8
TOWN	29	4.4	16	11.3
WORLD	21	3.2	17	12.0

WARDS METHOD



Florida

Frequency list using common exclude file:

TOTAL WORDS	541	THRESHOLD	0.000
TOTAL UNIQUE WORDS	25	RESTORING FORCE	0.100
TOTAL EPISODES	94	CYCLES	1
TOTAL LINES	388	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEACH	76	14.0	50	53.2
HOT	44	8.1	33	35.1
SUN	39	7.2	29	30.9
MIAMI	35	6.5	25	26.6
AMERICA	30	5.5	24	25.5
DISNEY	30	5.5	28	29.8
NICE	26	4.8	19	20.2
WATER	25	4.6	20	21.3
EVERGLADES	21	3.9	20	21.3
WORLD	20	3.7	15	16.0
MIND	19	3.5	13	13.8
TOURIST	15	2.8	13	13.8
HURRICANE	14	2.6	14	14.9
WEATHER	14	2.6	11	11.7
ENJOY	13	2.4	13	13.8
GOOD	13	2.4	12	12.8
HOUSES	13	2.4	10	10.6
STATE	13	2.4	10	10.6
GREAT	12	2.2	10	10.6
PROBABLY	12	2.2	11	11.7
WHITE	12	2.2	11	11.7
WONDERFUL	12	2.2	10	10.6
COURSE	11	2.0	10	10.6
NATURE	11	2.0	11	11.7
PALM	11	2.0	11	11.7

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
AMERICA	30	5.5	24	25.5
BEACH	76	14.0	50	53.2
COURSE	11	2.0	10	10.6
DISNEY	30	5.5	28	29.8
ENJOY	13	2.4	13	13.8
EVERGLADES	21	3.9	20	21.3
GOOD	13	2.4	12	12.8
GREAT	12	2.2	10	10.6
HOT	44	8.1	33	35.1
HOUSES	13	2.4	10	10.6
HURRICANE	14	2.6	14	14.9
MIAMI	35	6.5	25	26.6
MIND	19	3.5	13	13.8
NATURE	11	2.0	11	11.7
NICE	26	4.8	19	20.2
PALM	11	2.0	11	11.7
PROBABLY	12	2.2	11	11.7
STATE	13	2.4	10	10.6
SUN	39	7.2	29	30.9
TOURIST	15	2.8	13	13.8
WATER	25	4.6	20	21.3
WEATHER	14	2.6	11	11.7
WHITE	12	2.2	11	11.7
WONDERFUL	12	2.2	10	10.6
WORLD	20	3.7	15	16.0

ORESME Analysis lead to the exclusion of the following words:

- COURSE
- ENJOY
- GOOD
- GREAT
- HOUSES
- STATE
- WONDERFUL

TOTAL WORDS	454	THRESHOLD	0.000
TOTAL UNIQUE WORDS	18	RESTORING FORCE	0.100
TOTAL EPISODES	94	CYCLES	1
TOTAL LINES	388	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BEACH	76	16.7	50	53.2
HOT	44	9.7	33	35.1
SUN	39	8.6	29	30.9
MIAMI	35	7.7	25	26.6
AMERICA	30	6.6	24	25.5
DISNEY	30	6.6	28	29.8
NICE	26	5.7	19	20.2
WATER	25	5.5	20	21.3
EVERGLADES	21	4.6	20	21.3
WORLD	20	4.4	15	16.0
MIND	19	4.2	13	13.8
TOURIST	15	3.3	13	13.8
HURRICANE	14	3.1	14	14.9
WEATHER	14	3.1	11	11.7
PROBABLY	12	2.6	11	11.7
WHITE	12	2.6	11	11.7
NATURE	11	2.4	11	11.7
PALM	11	2.4	11	11.7

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
AMERICA	30	6.6	24	25.5
BEACH	76	16.7	50	53.2
DISNEY	30	6.6	28	29.8
EVERGLADES	21	4.6	20	21.3
HOT	44	9.7	33	35.1
HURRICANE	14	3.1	14	14.9
MIAMI	35	7.7	25	26.6
MIND	19	4.2	13	13.8
NATURE	11	2.4	11	11.7
NICE	26	5.7	19	20.2
PALM	11	2.4	11	11.7
PROBABLY	12	2.6	11	11.7
SUN	39	8.6	29	30.9
TOURIST	15	3.3	13	13.8
WATER	25	5.5	20	21.3
WEATHER	14	3.1	11	11.7
WHITE	12	2.6	11	11.7
WORLD	20	4.4	15	16.0

WARDS METHOD

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AMERICA...........<<<<<<<<<<<
                  <<<<<<<<<<<
HURRICANE.........<<<<<<<<<<<
                     <<<<<<<<
~~WORLD~~.................<<<<<<<< (excl. ambiguity)
                        <<<<<
~~PROBABLY~~..............<<<<<<< (excl. ambiguity)
                      <<<<<<<
TOURIST..............<<<<<<< (as in touristy)
                         <<<
~~MIND~~...................<<<<<< (excl. ambiguity)
                       <<<<<<
~~NICE~~...............<<<<<<<<<< (excl. ambiguity: various meanings incl. nice weather)
                    <<<<<<<<<<
~~WEATHER~~............<<<<<<<<<< (excl. ambiguity, incl. hot weather)
                        <<<<
PALM................<<<<<<<<<
                     <<<<<<<<<
WHITE...............<<<<<<<<< (white beach / houses / paving)
                          <<
BEACH..........<<<<<<<<<<<<<<<
               <<<<<<<<<<<<<<<
SUN............<<<<<<<<<<<<<<<
                <<<<<<<<<<<<<<
HOT.............<<<<<<<<<<<<<<
                 <<<<<<<<<<<<<
WATER............<<<<<<<<<<<<<
                          <
DISNEY......<<<<<<<<<<<<<<<<<<
            <<<<<<<<<<<<<<<<<<
MIAMI.......<<<<<<<<<<<<<<<<<<
             <<<<<<<<<<<<<<<<<
EVERGLADES...<<<<<<<<<<<<<<<<<
              <<<<<<<<<<<<<<<<
NATURE........<<<<<<<<<<<<<<<<
```

Morocco

Frequency list using common exclude file:

TOTAL WORDS	485	THRESHOLD	0.000
TOTAL UNIQUE WORDS	31	RESTORING FORCE	0.100
TOTAL EPISODES	68	CYCLES	1
TOTAL LINES	344	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	32	6.6	23	33.8
HOT	30	6.2	22	32.4
SMELL	26	5.4	22	32.4
CULTURE	25	5.2	18	26.5
DIFFERENT	25	5.2	19	27.9
DESERT	21	4.3	17	25.0
SPICE	21	4.3	18	26.5
COLOUR	18	3.7	16	23.5
DAY	17	3.5	13	19.1
STREET	17	3.5	11	16.2
CASABLANCA	15	3.1	10	14.7
EXPERIENCE	15	3.1	12	17.6
ARAB	14	2.9	11	16.2
MAYBE	14	2.9	10	14.7
NICE	14	2.9	10	14.7
BUILDING	13	2.7	12	17.6
MUSLIM	13	2.7	10	14.7
AFRICA	12	2.5	9	13.2
MARKET	12	2.5	11	16.2
PROBABLY	12	2.5	10	14.7
TEA	12	2.5	7	10.3
TOURIST	12	2.5	10	14.7
WORLD	12	2.5	10	14.7
CAMEL	11	2.3	8	11.8
ENJOY	11	2.3	9	13.2
NEVER	11	2.3	8	11.8
AIR	10	2.1	10	14.7
DOWN	10	2.1	9	13.2
FEEL	10	2.1	9	13.2
LONG	10	2.1	8	11.8
SUN	10	2.1	9	13.2

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
AFRICA	12	2.5	9	13.2
AIR	10	2.1	10	14.7
ARAB	14	2.9	11	16.2
BUILDING	13	2.7	12	17.6
CAMEL	11	2.3	8	11.8
CASABLANCA	15	3.1	10	14.7
COLOUR	18	3.7	16	23.5
COUNTRY	32	6.6	23	33.8
CULTURE	25	5.2	18	26.5
DAY	17	3.5	13	19.1
DESERT	21	4.3	17	25.0
DIFFERENT	25	5.2	19	27.9
DOWN	10	2.1	9	13.2
ENJOY	11	2.3	9	13.2
EXPERIENCE	15	3.1	12	17.6
FEEL	10	2.1	9	13.2
HOT	30	6.2	22	32.4
LONG	10	2.1	8	11.8
MARKET	12	2.5	11	16.2
MAYBE	14	2.9	10	14.7
MUSLIM	13	2.7	10	14.7
NEVER	11	2.3	8	11.8
NICE	14	2.9	10	14.7
PROBABLY	12	2.5	10	14.7
SMELL	26	5.4	22	32.4
SPICE	21	4.3	18	26.5
STREET	17	3.5	11	16.2
SUN	10	2.1	9	13.2
TEA	12	2.5	7	10.3
TOURIST	12	2.5	10	14.7
WORLD	12	2.5	10	14.7

TOTAL WORDS	374	THRESHOLD	0.000
TOTAL UNIQUE WORDS	22	RESTORING FORCE	0.100
TOTAL EPISODES	68	CYCLES	1
TOTAL LINES	344	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

ORESME Analysis lead to the exclusion of the following words:

- ENJOY
- FEEL
- MAYBE
- NEVER
- NICE
- EXPERIENCE
- PROBABLY
- TOURIST
- WORLD

DESCENDING FREQUENCY LIST					ALPHABETICALLY SORTED LIST				
WORD	FREQ	PCNT	CASE FREQ	CASE PCNT	WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	32	8.6	23	33.8	AFRICA	12	3.2	9	13.2
HOT	30	8.0	22	32.4	AIR	10	2.7	10	14.7
SMELL	26	7.0	22	32.4	ARAB	14	3.7	11	16.2
CULTURE	25	6.7	18	26.5	BUILDING	13	3.5	12	17.6
DIFFERENT	25	6.7	19	27.9	CAMEL	11	2.9	8	11.8
DESERT	21	5.6	17	25.0	CASABLANCA	15	4.0	10	14.7
SPICE	21	5.6	18	26.5	COLOUR	18	4.8	16	23.5
COLOUR	18	4.8	16	23.5	COUNTRY	32	8.6	23	33.8
DAY	17	4.5	13	19.1	CULTURE	25	6.7	18	26.5
STREET	17	4.5	11	16.2	DAY	17	4.5	13	19.1
CASABLANCA	15	4.0	10	14.7	DESERT	21	5.6	17	25.0
ARAB	14	3.7	11	16.2	DIFFERENT	25	6.7	19	27.9
BUILDING	13	3.5	12	17.6	DOWN	10	2.7	9	13.2
MUSLIM	13	3.5	10	14.7	HOT	30	8.0	22	32.4
AFRICA	12	3.2	9	13.2	LONG	10	2.7	8	11.8
MARKET	12	3.2	11	16.2	MARKET	12	3.2	11	16.2
TEA	12	3.2	7	10.3	MUSLIM	13	3.5	10	14.7
CAMEL	11	2.9	8	11.8	SMELL	26	7.0	22	32.4
AIR	10	2.7	10	14.7	SPICE	21	5.6	18	26.5
DOWN	10	2.7	9	13.2	STREET	17	4.5	11	16.2
LONG	10	2.7	8	11.8	SUN	10	2.7	9	13.2
SUN	10	2.7	9	13.2	TEA	12	3.2	7	10.3

WARDS METHOD

Singapore

Frequency list using common exclude file:

TOTAL WORDS	443	THRESHOLD	0.000
TOTAL UNIQUE WORDS	24	RESTORING FORCE	0.100
TOTAL EPISODES	82	CYCLES	1
TOTAL LINES	384	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
MODERN	36	8.1	26	31.7
CULTURE	33	7.4	25	30.5
STREET	31	7.0	22	26.8
ASIA	27	6.1	21	25.6
CLEAN	27	6.1	24	29.3
COUNTRY	27	6.1	23	28.0
BUILDING	23	5.2	20	24.4
HOT	20	4.5	15	18.3
HIGH	17	3.8	11	13.4
MIX	17	3.8	11	13.4
SHOP	17	3.8	12	14.6
DIFFERENT	16	3.6	12	14.6
NICE	16	3.6	11	13.4
BIG	14	3.2	12	14.6
CHINESE	14	3.2	10	12.2
FRIENDLY	14	3.2	14	17.1
SMELL	13	2.9	13	15.9
AIRPORT	12	2.7	10	12.2
BUSY	12	2.7	12	14.6
GREAT	12	2.7	9	11.0
HOTEL	12	2.7	11	13.4
COLOUR	11	2.5	10	12.2
EAST	11	2.5	9	11.0
EXOTIC	11	2.5	9	11.0

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
AIRPORT	12	2.7	10	12.2
ASIA	27	6.1	21	25.6
BIG	14	3.2	12	14.6
BUILDING	23	5.2	20	24.4
BUSY	12	2.7	12	14.6
CHINESE	14	3.2	10	12.2
CLEAN	27	6.1	24	29.3
COLOUR	11	2.5	10	12.2
COUNTRY	27	6.1	23	28.0
CULTURE	33	7.4	25	30.5
DIFFERENT	16	3.6	12	14.6
EAST	11	2.5	9	11.0
EXOTIC	11	2.5	9	11.0
FRIENDLY	14	3.2	14	17.1
GREAT	12	2.7	9	11.0
HIGH	17	3.8	11	13.4
HOT	20	4.5	15	18.3
HOTEL	12	2.7	11	13.4
MIX	17	3.8	11	13.4
MODERN	36	8.1	26	31.7
NICE	16	3.6	11	13.4
SHOP	17	3.8	12	14.6
SMELL	13	2.9	13	15.9
STREET	31	7.0	22	26.8

ORESME Analysis lead to the exclusion of the following words:

- BIG
- GREAT
- NICE

TOTAL WORDS	401	THRESHOLD	0.000
TOTAL UNIQUE WORDS	21	RESTORING FORCE	0.100
TOTAL EPISODES	82	CYCLES	1
TOTAL LINES	384	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

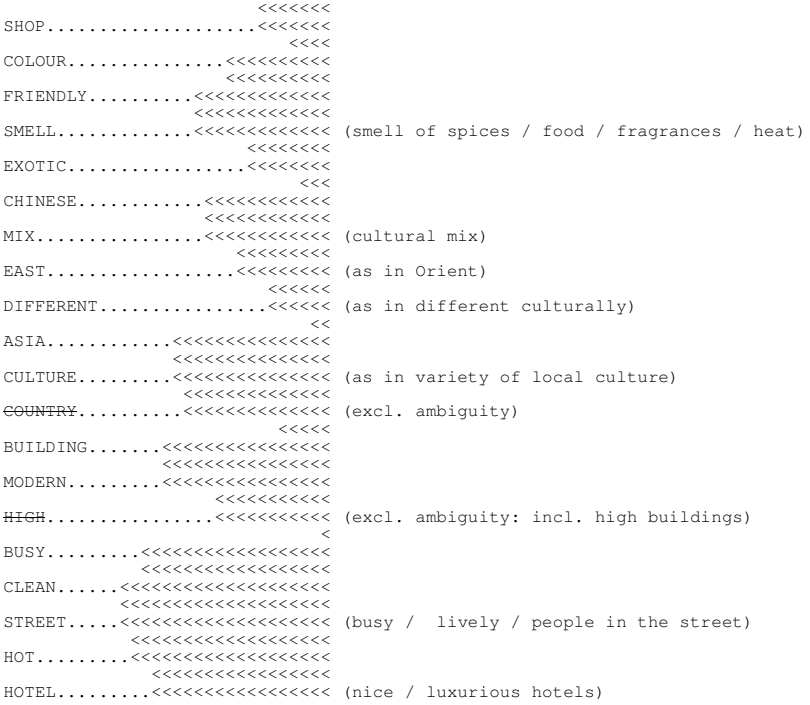
DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
MODERN	36	9.0	26	31.7
CULTURE	33	8.2	25	30.5
STREET	31	7.7	22	26.8
ASIA	27	6.7	21	25.6
CLEAN	27	6.7	24	29.3
COUNTRY	27	6.7	23	28.0
BUILDING	23	5.7	20	24.4
HOT	20	5.0	15	18.3
HIGH	17	4.2	11	13.4
MIX	17	4.2	11	13.4
SHOP	17	4.2	12	14.6
DIFFERENT	16	4.0	12	14.6
CHINESE	14	3.5	10	12.2
FRIENDLY	14	3.5	14	17.1
SMELL	13	3.2	13	15.9
AIRPORT	12	3.0	10	12.2
BUSY	12	3.0	12	14.6
HOTEL	12	3.0	11	13.4
COLOUR	11	2.7	10	12.2
EAST	11	2.7	9	11.0
EXOTIC	11	2.7	9	11.0

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
AIRPORT	12	3.0	10	12.2
ASIA	27	6.7	21	25.6
BUILDING	23	5.7	20	24.4
BUSY	12	3.0	12	14.6
CHINESE	14	3.5	10	12.2
CLEAN	27	6.7	24	29.3
COLOUR	11	2.7	10	12.2
COUNTRY	27	6.7	23	28.0
CULTURE	33	8.2	25	30.5
DIFFERENT	16	4.0	12	14.6
EAST	11	2.7	9	11.0
EXOTIC	11	2.7	9	11.0
FRIENDLY	14	3.5	14	17.1
HIGH	17	4.2	11	13.4
HOT	20	5.0	15	18.3
HOTEL	12	3.0	11	13.4
MIX	17	4.2	11	13.4
MODERN	36	9.0	26	31.7
SHOP	17	4.2	12	14.6
SMELL	13	3.2	13	15.9
STREET	31	7.7	22	26.8

WARDS METHOD



Wales

Frequency list using common exclude file:

TOTAL WORDS	282	THRESHOLD	0.000
TOTAL UNIQUE WORDS	22	RESTORING FORCE	0.100
TOTAL EPISODES	55	CYCLES	1
TOTAL LINES	228	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	20	7.1	15	27.3
GREEN	20	7.1	18	32.7
RAIN	18	6.4	15	27.3
NATURE	17	6.0	14	25.5
PUB	15	5.3	14	25.5
HILLS	14	5.0	14	25.5
NICE	14	5.0	10	18.2
BUILDING	13	4.6	11	20.0
CASTLES	13	4.6	12	21.8
COUNTRYSIDE	13	4.6	12	21.8
WELSH	13	4.6	6	10.9
NEVER	12	4.3	12	21.8
FRIENDLY	11	3.9	10	18.2
VILLAGE	11	3.9	10	18.2
EXPERIENCE	10	3.5	8	14.5
GOOD	10	3.5	8	14.5
OLD	10	3.5	9	16.4
PROBABLY	10	3.5	8	14.5
WALK	10	3.5	8	14.5
WEATHER	10	3.5	9	16.4
COLD	9	3.2	8	14.5
SHEEP	9	3.2	7	12.7

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BUILDING	13	4.6	11	20.0
CASTLES	13	4.6	12	21.8
COLD	9	3.2	8	14.5
COUNTRY	20	7.1	15	27.3
COUNTRYSIDE	13	4.6	12	21.8
EXPERIENCE	10	3.5	8	14.5
FRIENDLY	11	3.9	10	18.2
GOOD	10	3.5	8	14.5
GREEN	20	7.1	18	32.7
HILLS	14	5.0	14	25.5
NATURE	17	6.0	14	25.5
NEVER	12	4.3	12	21.8
NICE	14	5.0	10	18.2
OLD	10	3.5	9	16.4
PROBABLY	10	3.5	8	14.5
PUB	15	5.3	14	25.5
RAIN	18	6.4	15	27.3
SHEEP	9	3.2	7	12.7
VILLAGE	11	3.9	10	18.2
WALK	10	3.5	8	14.5
WEATHER	10	3.5	9	16.4
WELSH	13	4.6	6	10.9

ORESME Analysis lead to the exclusion of the following words:

- EXPERIENCE
- NICE
- PROBABLY

TOTAL WORDS	236	THRESHOLD	0.000
TOTAL UNIQUE WORDS	18	RESTORING FORCE	0.100
TOTAL EPISODES	55	CYCLES	1
TOTAL LINES	228	FUNCTION	Sigmoid (-1 - +1)
		CLAMPING	No

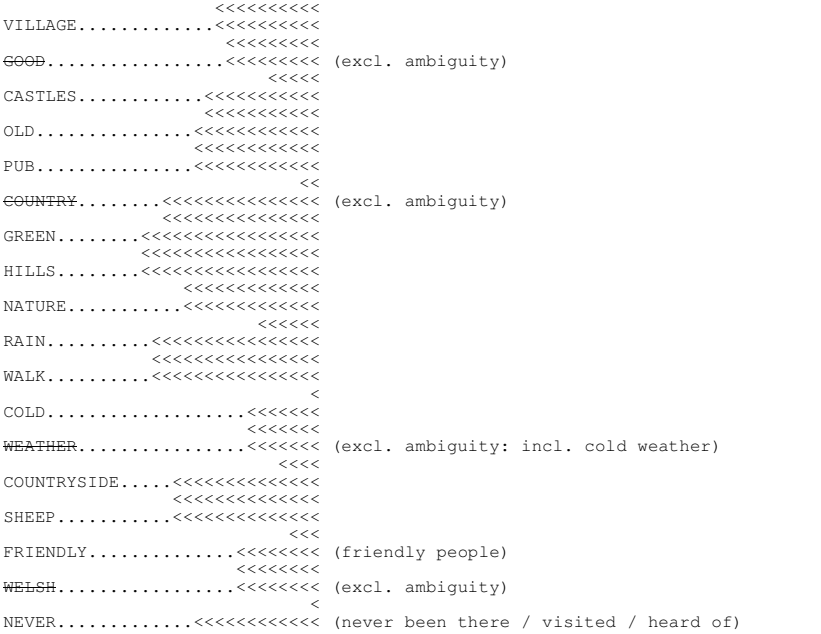
DESCENDING FREQUENCY LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
COUNTRY	20	8.5	15	27.3
GREEN	20	8.5	18	32.7
RAIN	18	7.6	15	27.3
NATURE	17	7.2	14	25.5
PUB	15	6.4	14	25.5
HILLS	14	5.9	14	25.5
BUILDING	13	5.5	11	20.0
CASTLES	13	5.5	12	21.8
COUNTRYSIDE	13	5.5	12	21.8
WELSH	13	5.5	6	10.9
NEVER	12	4.3	12	21.8
FRIENDLY	11	4.7	10	18.2
VILLAGE	11	4.7	10	18.2
GOOD	10	4.2	8	14.5
OLD	10	4.2	9	16.4
WALK	10	4.2	8	14.5
WEATHER	10	4.2	9	16.4
COLD	9	3.8	8	14.5
SHEEP	9	3.8	7	12.7

ALPHABETICALLY SORTED LIST

WORD	FREQ	PCNT	CASE FREQ	CASE PCNT
BUILDING	13	5.5	11	20.0
CASTLES	13	5.5	12	21.8
COLD	9	3.8	8	14.5
COUNTRY	20	8.5	15	27.3
COUNTRYSIDE	13	5.5	12	21.8
FRIENDLY	11	4.7	10	18.2
GOOD	10	4.2	8	14.5
GREEN	20	8.5	18	32.7
HILLS	14	5.9	14	25.5
NATURE	17	7.2	14	25.5
NEVER	12	4.3	12	21.8
OLD	10	4.2	9	16.4
PUB	15	6.4	14	25.5
RAIN	18	7.6	15	27.3
SHEEP	9	3.8	7	12.7
VILLAGE	11	4.7	10	18.2
WALK	10	4.2	8	14.5
WEATHER	10	4.2	9	16.4
WELSH	13	5.5	6	10.9

WARDS METHOD



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SAMENVATTING (SUMMARY IN DUTCH)

In onze hedendaagse maatschappij waarin mensen ervaringen opdoen in parallel semi-ontkoppelde virtuele en reële werelden, lijkt men in toenemende mate gedesoriënteerd. Met de huidige stand van de technologie staat de beeldvorming rond plaatsen, waar ook ter wereld, open voor commerciële productie en wordt deze op elk gewenst moment, *live* en op mondiale schaal, ingezet voor het creëren van vluchtige impressies. Het proces van globalisering zorgt voor mondiale geld-, informatie-, en migratiestromen. Massamedia zijn alom vertegenwoordigd en tegen eind 2005 zullen volgens de Computer Industry Almanac meer dan een miljard mensen op aarde toegang hebben tot internet. Daarnaast zorgde toerisme volgens de World Tourism Organisation in 2004 voor een record aantal van 760 miljoen internationale aankomsten wereldwijd. Plaatsimago's worden daarom in toenemende mate beïnvloed door dit mondiaal landschap van media, technologie, informatie, financiën en migratie en het is zeer onwaarschijnlijk dat deze beeldvorming een consistente en waarheidsgetrouwe weergave is van de lokale werkelijkheid en de plaatselijke identiteit. Vandaar dat in de titel van dit proefschrift gesproken wordt van 'glokale' identiteit, hetgeen enerzijds het spanningsveld en anderzijds de dynamische wisselwerking tussen lokale marktprocessen en het proces van globalisering benadrukt.

De 'sense of place' wordt door deze ontwikkelingen een vloeibaar begrip en de identiteiten en imago's van plaatsen krijgen een steeds grilliger karakter. Belangrijke maatschappelijke functies (zoals bijvoorbeeld financiële markten, transnationale productienetwerken, en de media) worden in toenemende mate gedomineerd door mondiale netwerken, terwijl ondergeschikte functies en vele bevolkingsgroepen in talrijke lokaliteiten steeds meer gefragmenteerd, afgezonderd en geïsoleerd geraken. De huidige netwerkeconomie roept dus tevens vragen op rond digitale kloven en sociale uitsluiting en vele auteurs, vanuit verschillende domeinen, pleiten dan ook voor een hernieuwde sociale interactie in deze snel evoluerende online samenleving. Eén van de problemen is echter dat onze fysieke en sociale ruimte, maar ook informatieprocessen en onze mentale inspanningen, steeds meer van elkaar ontkoppeld worden. Om sociale interactie te bewerkstelligen hoeft men niet langer fysiek - en sommigen zouden beweren, noch mentaal - aanwezig te zijn op een bepaalde plek en mensen betreden en verlaten verschillende ruimtes op uiteenlopende tijdsstippen en op een ongesynchroniseerde manier. Aan de vraagkant leidt deze interactiviteit tot een lifestyle die wordt gekenmerkt door mobiliteit, haast en parallelle ervaringen (reizen, maar tegelijkertijd verbonden zijn per GSM en mobiel internet), maar tevens het buitensluiten van allerlei zintuiglijke stimuli, het cultiveren van een blasé attitude, kortzichtige specialisatie op een bepaald domein en oversimplificatie van maatschappelijke gebeurtenissen. Soms vraagt men zich zelfs af of bepaalde mensen nog wel weten wat virtueel en wat 'echt' is. In de samenleving leidt dit tot vragen rond macht en zeggenschap. Wie is bijvoorbeeld verantwoordelijk voor – en wat is de inhoud van – het imago dat men wenst te projecteren in deze mondiale stromen van media, communicatie, informatie en migratie. Vele nationale en regionale toerismebureaus richten hun blik nog op de lokale ruimte. Zij besteden geen of nauwelijks aandacht aan de wijzigende verhoudingen op het niveau van de wereldmarkt en de invloed daarvan op de relatie tussen organisatie en omgeving op het lokale niveau. Het is tegen de achtergrond van dit decor dat dit proefschrift tracht te onderzoeken op welke manier imago's van toeristische

bestemmingen worden gevormd en gemanipuleerd en vervolgens kunnen worden aangepast om bij te dragen aan de goede economische prestaties van een regio. Het is alsof we onszelf afvragen hoe acteur Keanu Reeves, in de film *The Matrix* van de broers Wachowski, zich zijn ideale toeristische bestemming zou voorstellen.

Ook op het snijvlak van marketing en informatie en communicatietechnologie (ICT) zien we een duidelijke verschuiving in de interpretatie van de sociale ruimte. De combinatie van massaindividualisering en verspreiding van ICT leidde over de afgelopen decennia tot flexibilisering en een digitalisering en disintermediatie van de klantinteractie om zo een verschuiving van massaproductie naar een volledig geautomatiseerde massa-op-maat-productie te faciliteren. Een en ander resulteerde in een verarming van de sociale interactie in de distributieketen en was de aanleiding tot de verheerlijking van de beleveniseconomie (men verwijst al geruime tijd naar toerisme als zijnde een hedonistisch product, waarbij de consumptiebeleving centraal staat en wordt gekenmerkt door multi-zintuiglijke en emotionele aspecten; de beleveniseconomie was daarom voor ons eerder een plotse hype van aandacht voor een ontwikkeling die al langer en geleidelijker aan de gang was). Desalniettemin riep deze zogenaamde nieuwe economie vragen op wat betreft sociale uitsluiting en 'toegang'; enerzijds van consumenten tot de beleveniseconomie en anderzijds van ondernemingen tot de markt. Dit resulteerde in een recente denkrichting waarin men meer waarde gaat hechten aan een directe betrokkenheid van de consument bij de bedrijfsvoering van ondernemingen. Het coöpteren van de klant - of het aanwenden van de vaardigheden van de consument als 'co-creator' – leidt tot een hernieuwde, maar nu directe, dialoog tussen ondernemingen en klanten, maar ook tussen consumenten onderling. Voorbeelden zijn virtuele gemeenschappen, het collaboratief filteren van aanbod (conform Amazon.com, waarbij de online gemeenschap wordt aangewend om te komen tot gepersonaliseerde aanbevelingen) en virale online marketing, waarbij de markt wordt omhelsd als een forum. Het sociale element en de nood aan het opbouwen van persoonlijke vertrouwensrelaties, dat dus tijdelijk uit de waardeketen was weggesneden door automatisering, is terug en lijkt sterker dan ooit een rol van betekenis te zijn beschoren. Het is dan ook niet verwonderlijk dat applicaties als online forums, 'instant messaging', gratis webmail, 'click-to-talk' en natuurlijk 'blogging' (persoonlijke web-logs) steeds populairder worden. In 2004 werd zelfs de Word of Mouth Marketing Association (WOMMA) opgericht en verscheen er een artikel over 'buzz marketing' op de voorpagina van New York Times Magazine. Niet alleen in het algemeen, maar ook in de reissector zijn deze ontwikkelingen duidelijk waarneembaar. Wat zich aandient is een ontwikkeling weg van het eenzijdig pushproces van massacommunicatie en vaste kanalen, naar een situatie welke wordt gedomineerd door dynamische interactieve processen, die hun grondslag hebben in begrippen als delen, reflecteren, selecteren, debatteren en ervaren. In deze nieuwe netwerkeconomie, die wordt aangedreven door 'gedemassificeerde' media, zullen zaken als merkenbeleid, identiteit en imago een centrale rol spelen.

Op het domein van toeristisch bestemmingsimago, heeft zich sinds het begin van de jaren zeventig in de wetenschappelijke toerismeliteratuur een substantiële publicatiestroom opgebouwd welke inmiddels is aangezwollen tot meer dan 140 papers. Echter, de meeste van deze studies richten zich op de statische structuur van bestemmingsimago door de relatie tussen imago en gedrag te onderzoeken. Er is weinig empirisch onderzoek voorhanden dat zich bezig houdt met de vraag hoe bestemmingsimago eigenlijk tot stand

komt, terwijl uit de bovenstaande discussie juist naar voren komt dat de dynamiek rond imagovorming, en de relatie met identiteit, van cruciaal belang is. Daarom wordt in hoofdstuk 2 van dit proefschrift een toeristisch bestemmingsimago ontwikkelingsmodel geconstrueerd. Alle elementen die een dynamische invloed hebben op de manier waarop bestemmingsimago wordt geformuleerd door de consument, zijn hierin opgenomen. Dit leidt tot de identificatie van drie kloven (gaps) die kunnen leiden tot spanningen in de relatie tussen vraag en aanbod - *host* en *guest* - en het is daarom dat we refereren aan het 3-gap model.

Allereerst beargumenteren we dat het toeristisch productaanbod (vervoer, verblijf en vermaak) en het geprojecteerd imago (door middel van marketingcommunicatie, de media, ICT en anderzijds gecreëerde betekenis op basis van verhalen en de visualisering) moet worden afgestemd op de glokale identiteit. Als dit niet gebeurt ontstaat een strategische toeristische ontwikkelingskloof (de eerste kloof). Het gepretendeerd geprojecteerd imago en vervalste productaanbod zullen ontmanteld worden wanneer de toerist, die op zoek is naar 'zijn wortels', de bestemming bezoekt, hetgeen mogelijk tot ontevredenheid leidt. Het is tevens de identiteit van de bestemming die het concurrentieel voordeel bepaalt. Deze ligt verscholen in de natuurlijke omgeving, cultuur, religie, historie of specifieke kennis en/of vaardigheden van de bevolking van een plek. Authenticiteit is daarbij een herhaaldelijk terugkerend begrip in het huidige discours. In plaats van daarbij een academisch theoretische discussie te voeren over wat authentiek is en wat niet, leggen wij de nadruk op het sociale element, waarbij authenticiteit alles te maken heeft met mensen die gezamenlijk belevenissen creëren waar ze belang aan hechten. Zolang dit betekenisvol is voor zowel host als gast en deze authentieke identiteit op een eerlijke manier wordt geprojecteerd en vertaald in een rijk toeristische productaanbod, hetgeen gefaciliteerd kan worden door een sterk doordacht merkenbeleid, dan zal de eerste kloof worden overbrugd.

Het geprojecteerde imago, samen met zogenoemde 'plaatsvervangende belevingen' (zoals gefaciliteerd door intermediairen en geproduceerde verbeelding in kunst, literatuur en populaire cultuur, zoals speelfilms en virtuele belevingen) vormt de basis voor het door de consument gepercipieerd imago. Echter, het is van belang op te merken dat het gepercipieerd imago naast marketinginformatie, 'cultural content' en technologische infrastructuur, ook wordt beïnvloed door tijdelijke omgevingsfactoren of situationele omstandigheden zoals politieke veranderingen, economische condities, technologische vooruitgang en sociale veranderingen. Nieuwsmedia hebben hierbij een belangrijke invloed op het gepercipieerd imago van toeristische bestemmingen. Tevens gaan consumenten gebogen onder selectieve blootstelling, selectieve aandacht, selectieve vervorming en een selectief geheugen. Hetgeen dat men verwerkt en opslaat en dus invloed heeft op het gepercipieerd imago wordt beïnvloed door factoren als culturele achtergrond, en sociale, persoonlijke en psychologische kenmerken. Tenslotte kan ook mond-tot-mond en mond-tot-muis (online consumentencommunicatie) informatie invloed hebben op de beeldvorming, hetgeen uiteindelijk kan leiden tot een gepercipieerd imago dat niet langer aansluit op de werkelijkheid, zelfs als het geprojecteerd imago, het productaanbod en de identiteit goed op elkaar zijn afgestemd. In dat geval onstaat een kloof rond de specificatie van de toeristische vraag, kloof 2.

Uiteindelijk wordt het gepercipieerd imago getoetst aan het aanbod wanneer de toerist de bestemming bezoekt. Deze gepercipieerde toeristische beleving (hetgeen men waarneemt op de bestemming kan ook beïnvloed worden door selectieve aandacht, vervorming en een selectief geheugen) kan aanleiding zijn tot een conflict tussen de werkelijke identiteit, het productaanbod en het imago. Zelfs al is het gepercipieerd imago in overeenstemming met het geprojecteerd imago en de identiteit van plaats, dan nog kan een derde kloof ontstaan. We spreken daarbij van de toeristische aanbods- en overdrachtskloof. Aangezien toerisme alles te maken heeft met dienstverlening (ontastbaarheid), waarbij consumptie en productie gelijktijdig plaatsvinden om zo de consument een onvergetelijke ervaring te bezorgen, is ook hier het sociale element van vitaal belang. Host-gast ontmoetingen zijn cruciaal, maar ook de relaties met andere reizigers binnen en buiten het reisgezelschap zijn van invloed op de beleving. Consistentie in de dienstverlening is daardoor problematisch en kan leiden tot kloof 3. Bestaande managementpraktijken en literatuur spitsen zich vooral toe op rationele oplossingen voor deze problematiek, bijvoorbeeld door middel van standaardisatie, formele werkingsprocedures en training. Met de huidige stand van de technologie wordt daardoor het dienstverleningsproces steeds afstandelijker en klinisch, hetgeen, zoals we al eerder zagen, heeft geleid tot een vraag naar een hernieuwde verpersoonlijking van de dienstverlening en het betrekken van de consument in het proces. Daarbij is het tevens van belang dat toeristische bestemmingen meerdere kanalen in overeenstemming met elkaar brengen, niet alleen de lokale consumptiebeleving, maar ook het geprojecteerd imago en plaatsvervangende belevingen in populaire cultuur en de virtuele wereld (waarbij ook met sociale interactie, bijvoorbeeld in virtuele gemeenschappen, rekening gehouden moet worden). Het betrekken van de klant in dit proces kan een manier zijn om de heterogeniteit in de dienstverlening het hoofd te bieden. Eén en ander hangt ook af van de manier waarop besluitvormers in staat zijn om de glokale identiteit te vertalen in een harmonieuze multi- zintuiglijke emotionele beleving en communicatie. Dit is mede afhankelijk van het wereldbeeld dat de besluitvormers zelf hebben, waarbij dit vaak leidt tot spanningen tussen publieke en private partijen, die respectievelijk het bewaren van culturele identiteit ofwel de commercialisering ervan als hoofddoelstelling hebben.

Het laatste valt ook te concluderen uit ons empirisch onderzoek naar geprojecteerd imago (de aanbodzijde), hetgeen wordt besproken in hoofdstuk 3 in samenhang met hoofdstuk 4, waar we ons richten op het gepercipieerd imago (de vraagkant). Als centraal onderzoeksdecor fungeert bestemming Dubai, een stedelijk gebied dat vanwege een aantal kenmerken interessant is in het kader van dit onderzoek, zoals: haar geografische locatie op het kruispunt van verschillende beschavingen; met een moderne smeltkroes van wereldculturen met een tachtig procent expatgemeenschap; evenals een aspiratie om een mondiale hub te worden voor toerisme, technologie en handel, waarbij men tegelijkertijd een grote mate van eerbied voor het erfgoed, de lokale cultuur en tradities tracht te betonen. Hoofdstuk 3 geeft een gedetailleerde beschrijving van deze onderzoekssetting. Dit is van belang omdat het ons in staat stelt om het geprojecteerd en gepercipieerd imago te toetsen aan de plaatselijke identiteit. Tegelijkertijd wensen wij de lezer erop te wijzen dat dit proefschrift in eerste instantie niet over Dubai gaat, maar een typisch voorbeeld weerspiegelt van een snel ontwikkelende stadstaat of regio, die in minder dan 15 jaar een belangrijke positie heeft ingenomen in het netwerk van mondiale globaliseringstromen. Het gaat dus om de manier waarop ontwikkelingen op wereldniveau lokale vormen

aannemen en vice versa, alsook en vooral de manier waarop dit onderzoek in staat is om geprojecteerde en gepercipieerde imago's in kaart te brengen. Dit kan niet zonder referentiekader dat is geworteld in de lokale situatie. Echter, de resultaten van dit onderzoek, de empirische evaluatie van het 3-gap model en zeker de toegepaste methodologie zullen interessant zijn voor vele toeristische bestemmingen in het opdoemende netwerk van mondiale hubs.

De rode draad in de onderzoeksbenadering in dit proefschrift is gebaseerd op fenomenografie, een benadering welke voortbouwt op het domein van de sociale omgevingspsychologie. We veronderstellen dat, evenals in het constructivisme van Kant en het existentialisme van Kierkegaard en Heidegger, de 'realiteit' verwijst naar fenomenen die 'daarbuiten' bestaan, onafhankelijk van onze eigen wilskracht. Tegelijkertijd heeft deze realiteit een eventueel andere betekenis voor ieder individu en onderzoek dient dan ook de objectiviteit van consensus, maar tevens de subjectieve betekenis voor het individu, te meten. Het kwalitatief onderzoek dat dit impliceert, wordt traditioneel als problematisch ervaren vanwege praktische onderzoeksbeperkingen wat betreft tijd en middelen die men dient te investeren voor transcriptie en analyse van de verzamelde data. In dit proefschrift hebben we daarvoor een oplossing gevonden door gebruik te maken van geautomatiseerde inhoudsanalyse op basis van software, CATPAC genaamd, welke is gemodelleerd op de werking van neurale netwerken bij mensen. Deze gecomputeriseerde inhoudsanalyse maakt een snelle doch nauwkeurige en objectieve analyse van de kwalitatieve data mogelijk, terwijl het tegelijkertijd toestaat om resultaten te kwantificeren en te gebruiken voor statistische procedures.

Het geprojecteerd imago van Dubai werd op deze manier gemeten door een inhoudsanalyse uit te voeren op twintig in Dubai gevestigde toeristische websites. Het betrof 15 lokale toeroperators, 3 lokale hotelketens en de sites van het bureau voor toerisme en de luchthaven. Op de in totaal 505 foto's die van de 20 sites werden gedownload werd een visuele inhoudsanalyse uitgevoerd door middel van het identificeren van motieven (objecten of gedaanten) en thema's. Objecten werden geanalyseerd op drie niveaus, wat betreft aanwezigheid (wat wordt getoond), ordening (welke objecten worden samen getoond of geclusterd) en context (het kader waarin objecten geplaatst zijn). Door objecten met elkaar en hun context te correleren konden centrale thema's geïdentificeerd worden. Tekstueel werd op 92.481 woorden inhoudsanalyse uitgevoerd met behulp van CATPAC, waarbij men tevens centrale thema's achterhaalt door woorden te clusteren (met behulp van hiërarchische clusteranalyse) op basis van het aantal keren dat woorden al dan niet tezamen in dezelfde context gebruikt worden. Methodologisch is de belangrijkste vaststelling voor dit deel van het onderzoek dat de paralel uitgevoegde inhoudsanalyses van foto's en tekst grote convergente validiteit vertonen. Inhoudelijk is de belangrijkste conclusie dat de verbeelding van de identiteit van plaats, de cultuur en het erfgoed van Dubai hoofdzakelijk wordt overgelaten aan de overheid en vooral het bureau voor toerisme. De hotels, de luchthaven en vele toeroperators projecteren hoofdzakelijk productgeoriënteerde faciliteiten en activiteiten, hetgeen bijdraagt aan de vercommercialisering en het consumerend karakter van toerisme. Publieke en private partijen lijken dan ook elkaar tegen te werken, waardoor een onsamenhangend imago wordt geprojecteerd dat op termijn kan leiden tot valse verwachtingen aan de zijde van de

gast en in het verlengde daarvan eventuele spanningen in de ontmoeting tussen host en gast.

In hoofdstuk 4, waarin we ons richten op het gepercipieerd imago, wordt eerst een Nederlandse studie gepresenteerd, waarbij het imago van Nederland als binnenlandse vakantiebestemming voor Nederlanders werd geanalyseerd. Het illustreert de ontoereikendheid van bestaande methodologieën die men vaak hanteert voor het meten van gepercipieerd imago. Op basis van gestandaardiseerde algemeen (op verschillende bestemmingen) toepasbare attributen, zoals geïdentificeerd in literatuur en bevestigd door het management van het bureau voor toerisme, waren we niet in staat om verschillen in bestemmingskeuzegedrag onder Nederlandse consumenten te verklaren. Gebaseerd op het AIDA-model werden in een nationaal representatieve steekproef vier groepen van consumenten geïdentificeerd: diegenen die vaak een vakantie in eigen land doorbrengen; diegenen die dat wel overwegen, maar het niet doen; diegenen die altijd naar het buitenland gaan en waarvoor een vakantie in eigen land geen optie is; en tenslotte diegenen die nog geeneens hebben overwogen waar ze naartoe op vakantie gaan, met andere woorden, consumenten die helemaal niet of zelden reizen. In tegenstelling tot wat men zou verwachten, bleken er geen significante verschillen te bestaan in het gepercipieerd imago van Nederland vakantieland tussen deze vier groepen. Dit is strijdig met de literatuur waarin wordt beweerd dat gepercipieerd imago consumentenvoorkeuren bepaalt en daarmee bestemmingskeuzegedrag beïnvloedt. De logische verklaring hiervoor vonden wij in de aanname dat de gestandaardiseerde algemene attributen zich beperken tot hygiënefactoren en daarmee niet in staat zijn om de subjectieve perceptie van individuen en de verpersoonlijking van bestemmingsimago door de consument te meten. We concludeerden dat men een methode zou moeten ontwikkelen waarmee ook unieke elementen en holistische impressies, die specifiek betrekking hebben op de bestemming in kwestie, gemeten zouden kunnen worden.

Daarom werd vervolgens een kwalitatieve benadering gehanteerd om het gepercipieerd imago van Dubai te meten, en, ter evaluatie van de discriminatievaliditeit, te vergelijken met Florida, de Kanarische Eilanden, Marokko, Singapore, Vlaanderen en Wales. Bezoekers aan de virtuele reisgemeenschap Travellerspoint.com werden uitgenodigd om aan het onderzoeksproject deel te nemen. Maar in plaats van deelnemers traditionele lijsten van 'mee eens / oneens' stellingen voor te leggen, werden respondenten in deze studie gevraagd om hun gedachten te beschrijven in open verhaalvorm. Op de grote hoeveelheid kwalitatieve data van de 1.100 bruikbare reacties werd een inhoudsanalyse uitgevoerd door middel van CATPAC. Ondanks het feit dat men moet veronderstellen dat het gerapporteerde imago van de zeven casusbestemmingen niet representatief is voor de wereldpopulatie (een online verzamelde respons van 1.100 individuen zal niet representatief zijn), blijkt de toepassing van de methodologie een succes. Aangezien niet zozeer de inhoud van de resultaten zelf, maar eerder de bruikbaarheid van de toegepaste methodologie ons interesseert, draagt het onderzoek sterk bij aan het vervullen van de doelstellingen van het voorliggende onderzoek. De indrukvaliditeit (face validity) van de methodologie was evident aangezien verschillende bevindingen de verwachtingen bevestigen. Zo ligt het imago van Wales en Vlaanderen dichter bij elkaar, evenals dat van de Kanarische Eilanden en Florida, terwijl Singapore en Dubai eerder op zichzelf staan, ondanks het feit dat zij het begrip 'moderniteit' delen als één van de kenmerkende

eigenschappen als snel ontwikkelende stadstaten. De Kanarische Eilanden en Florida lijken dan weer op Dubai voor zover dat het 'zon, zee en strand'-bestemmingen betreft. Marokko daarentegen is verbonden met Dubai wat betreft het exotische, de Arabische cultuur en de woestijn. De convergente validiteit van de methodologie wordt bevestigd door het aantreffen van overeenstemming tussen het gemeten imago en hetgeen wordt beschreven in de literatuur. Bij Dubai denkt men dan vooral aan het exotische wat betreft cultuur en klimaat, moderne architectuur, de woestijn, winkelen, het Arabisch erfgoed en rijkdom. Het warme klimaat en daarmee de attractiviteit als 'zon, zee en strand'-bestemming met exclusieve hotels en winkelcentra, is een imago van Dubai dat vooral in Europa domineert.

Andere resultaten liggen minder voor de hand en de discriminatievaliditeit werd dan ook aangetoond door de unieke verschillen die tussen bestemmingen worden aangetroffen en ook de verschillende percepties die bestaan bij uiteenlopende consumentengroepen (verschillen tussen mannen en vrouwen en groepen met verschillende culturele achtergronden). Bijvoorbeeld in het geval van Vlaanderen refereerden respondenten vreemd genoeg regelmatig aan de Franse taal. Bovendien maakte meer dan 14% van de respondenten opmerkingen zoals "ik ben nog nooit in Vlaanderen of West Europa geweest / heb daar nog nooit van gehoord". Dit percentage loopt op tot 21% voor Dubai en 22% voor Wales, terwijl zulke opmerkingen voor de Kanarische Eilanden, Florida en Singapore nauwelijks voorkomen. Dit duidt erop dat Vlaanderen en vooral Dubai en Wales eerder een zwakker imago hebben in vergelijking met andere bestemmingen, waarbij de opmerkingen die respondenten maken eerder een excuus lijken voor het feit dat ze weinig kennis hebben van de bestemming in kwestie. Ook opzienbarend voor Dubai was de observatie dat 14% van de respondenten, vooral Amerikaanse en Europese vrouwen, opmerkingen maakten over de positie van vrouwen in Moslim / Arabische landen. Er bestaan blijkbaar een aantal mispercepties zoals de veronderstelling dat vrouwelijke toeristen in Dubai gesluierd zouden moeten gaan, dat vrouwen in Dubai geen auto mogen rijden of dat je niet veel vrouwen in het openbaar zou zien. Dit is verwonderlijk omdat Dubai juist één van de meest westerse steden in de Golf is en bekend staat om haar kosmopolitisch karakter.

De resultaten van ons onderzoek, wat betreft het geprojecteerd en gepercipieerd imago van Dubai, waarbij blijkt dat Dubai te kampen heeft met een spanningsveld tussen enerzijds een zeer snelle ontwikkeling binnen het netwerk van mondiale hubs, met aan de andere kant een sterke lokale identiteit, leidt ons tot de eindconclusie dat men alle drie de kloven in het 3-gap model in Dubai dient te overbruggen. Een manier waarop men dat theoretisch zou kunnen doen is door middel van een goed doordacht merkenbeleid voor de gehele bestemming. In het laatste hoofdstuk 5, de eindconclusies, wordt dit kort verduidelijkt. Allereerst wordt betoogd dat merkontwikkeling een proces van 'soul searching' is. Bureaus voor toerisme moeten in consultatie met overheden en privé-sectoren allereerst de identiteit van plaats ofwel de strategische persoonlijkheid bepalen. Daaraan gekoppeld wordt een coherent toeristisch productaanbod samengesteld, inclusief de communicatiestrategie waarin consistent dezelfde verhalen met goede visuele ondersteuning en slogans naar buiten worden gebracht. Dit ondersteunt een proces waarbij het geprojecteerd bestemmingsimago steeds meer in lijn met de realiteit zal komen te liggen, hetgeen de strategische toeristische ontwikkelingskloof overbrugt. Wanneer, afgezien van betaalde reclame, goed gebruik wordt gemaakt van de media en

plaatsvervangende belevingen, kan dit de 'specificatie van de toeristische vraag'-kloof helpen overbruggen, aangezien het gepercipieerd imago de juiste verwachtingen zal creëren. Tenslotte, aangezien alle belanghebbenden, toeristische sectoren en overheden, betrokken zijn bij het merkontwikkelingsproces, en het geprojecteerd imago in overeenstemming zal zijn met de glokale identiteit, zal de merkstrategie hopelijk het dienstverlenend personeel verenigen en een leidraad zijn voor hun dagelijkse interactie met de toerist. Eén en ander wordt uiteraard bekrachtigd door gepaste merkondersteunende verkoopstrategieën, normering van dienstverleningsprestaties, een proces van klantcoöptatie, en promotionele activiteiten die helpen om de toeristische aanbods- en overdrachtskloof te overbruggen. De manier waarop het succes van deze strategieën bij het overbruggen van de imagokloven gemeten kan worden en in welke mate deze theoretische veronderstellingen omtrent het nut van merkenbeleid terecht zijn, is een belangrijk en vruchtbaar terrein voor toekomstig onderzoek.

Onze bijdrage, met dit onderzoek, betreft twee specifieke domeinen. Allereerst hebben we aangetoond dat de innovatieve methodologie van geautomatiseerde inhoudsanalyse, zoals toegepast in zowel de analyse van online geprojecteerd imago als in de analyse van kwalitatieve surveydata met betrekking tot gepercipieerd imago, tot valide resultaten leidt. Ten tweede heeft het voorliggende onderzoek bijgedragen tot het formuleren van een generiek dynamisch toeristisch bestemmingsimago-ontwikkelingsmodel. Alle relaties die in het model werden gesuggereerd op basis van literatuurstudie en integratie in hoofdstuk 2, konden we onderscheiden in het empirisch materiaal. Dientengevolge is het model nu verankerd in (gekwantificeerde) kwalitatieve data. Toekomstig onderzoek kan zich nu toeleggen op het statistisch onderbouwen van causale verbanden, voor zover dat nog niet in bestaande literatuur is gebeurd. We hopen dan ook dat we op deze manier een bescheiden algemeen maatschappelijke bijdrage hebben kunnen leveren, als toeristische bestemmingen mogelijk een beter zicht krijgen op de complexiteit waarmee plaatsmarketing en imagovorming gepaard gaan. Recent onderzoekt toont aan dat puur rationele benaderingen ten aanzien van strategisch marketing management en de toepassing van informatie en communicatietechnologie ontoereikend zijn. Bovendien, om de consument te beschouwen als een louter rationele beslisser is ook een misvatting. Als toeristische bestemmingen de imagokloven in hun huidig beleid (h)erkennen en wensen te overbruggen en er zeker van willen zijn dat klanttevredenheid en een genoegzame host-gast ontmoeting prevaleren, dan zullen zij de door hun ingeslagen koers moeten wijzigen. In het bijzonder zullen zij zich moeten richten op het bouwen van vertrouwen, het opnemen van elementen van sociale betrokkenheid in hun geprojecteerd imago, en zich moeten gedragen in lijn met wie en wat zij werkelijk zijn, ofwel bouwen aan uniciteit op basis van identiteit. Met andere woorden, toeristische bestemmingen moeten zich menselijker opstellen.

CURRICULUM VITAE

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Robert Govers, die geboren werd op 16 mei 1968 in Den Haag, werkt momenteel als Onderzoekscoördinator aan het Steunpunt voor Beleidsrelevant Onderzoek Toerisme en Recreatie van de Katholieke Universiteit Leuven, België. Hieraan voorafgaande werkte hij in Dubai als hoofddocent Toerisme en Marketing. Hij verbleef in Dubai voor vier jaar, waaronder twee jaar aan de Emirates Academy of Hospitality Management, een hotelschool in academische associatie met École hôlelière de Lausanne. Robert studeerde af in 1995 met een Master in Marketing van de Faculteit Bedrijfskunde aan de Erasmus Universiteit Rotterdam en beschikt tevens over een Bachelor in Informatieanalyse. Robert begon zijn academische carrière als een gastdocent aan de Witwatersrand Technikon Johannesburg, Zuid Afrika. Daarna was hij Projectleider Contractonderzoek bij het Centrum voor Toerisme Management aan Rotterdam School of Management. Samen met Prof. dr. Frank M. Go, is Robert co-auteur van Entrepreneurship in Toerisme, een paperback gepubliceerd door de Stichting Maatschappij en Ondernemen. Tevens was hij co-auteur van verschillende publicaties in internationale wetenschappelijke tijdschriften en conferentie proceedings op het gebied van toerisme, hospitality en kwaliteitsmagement, e-commerce in toerisme en toerismeonderzoek en marketing. Als projectmanager is Robert betrokken geweest bij vele consultancyprojecten voor gerespecteerde organisaties als IATA, de Europese Commissie, de Vlaamse Overheid en een aantal Nederlandse ministeries en toeristenbureaus.

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Virtual Tourism Destination Image

Glocal identities constructed, perceived and experienced

Will local identities become more important in the face of globalisation? Or will successful international hubs be able to reproduce cultural identities in ephemeral images and copied environments such as on The World? This cluster of man-made islands, representing both a local and global theme, is currently being built off the Dubai coast. The effects of such mega-projects and tourism development in Dubai, particularly in terms of the reproduction of its cultural identity, forms the central research background for this dissertation. The duality between the local and the global is integrated in the dynamic tourism destination image formation model that is constructed in this investigation. It identifies a triadic tension between place identity, its projection and the consumers' perceived image. This tension is short circuited during the travel experience, when host (supply) meets guest (demand). At this overlap, three potential gaps could negatively affect the level of satisfaction experienced in the host – guest encounter. The empirical research focuses on measuring projected and perceived images in order to test the way in which the gaps can be assessed. This is accomplished through an innovative methodology based on computerised-supported content analysis. The projected image is measured through a content analysis of 20 Dubai based websites while the perceived images are gauged by content analysing 1.100 online responses to a qualitative image survey. The results for Dubai were compared to other destinations such as the Canady Islands, Flanders, Florida, Morocco, Singapore and Wales. And indicate that gaps exist because of a friction between Dubai's rapid development as a global hub and its strong local identity and image. A theoretical solution for bridging the gaps is discussed and conceptually applied in the concluding chapter. It is based on the destination branding literature and establishes the general usefulness of the model and its research methodology.

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