Branding Nations as Tourism Destinations in the USA.

The Australian Experience

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For the degree of **Doctor of Philosophy**
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November 2005

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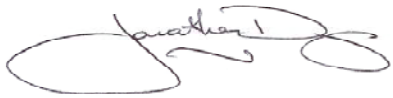

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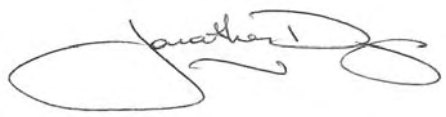
I declare that this thesis is my own work but I acknowledge that the production of this thesis has benefited significantly from the contribution of several others. Specifically I acknowledge the work of Professors Laurie Murphy and Philip Pearce in the supervision of the thesis and their contribution to the editing process; and Amy So in the development of the websites used in the administration of the questionnaires in the thesis.

I also acknowledge Tourism Queensland for their financial support in the development of this thesis.



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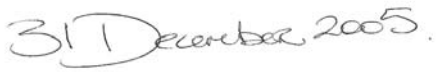

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The Research presented and reported in this thesis was conducted within the guidelines for research ethics outlined in the *National Statement on Ethics Conduct in Research involving Humans (*1999), the *James Cook University Policy on Experimentation Ethics. Standard Practices and Guidelines* (2001), and the *James Cook University and Guidelines on Research Practice* (2001). The proposed research methodology received clearance from the James Cook University Experimentation Ethics Review Committee (Approval number H1808).

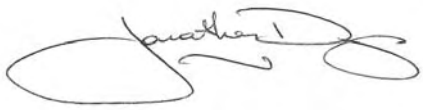
Jonathon Day 31 December 2005

Acknowledgements

Although I have declared this thesis my own work, its completion would not have been possible without the guidance, support and assistance of several individuals and organizations. I would like to acknowledge the assistance and cooperation of Tourism Australia and in particular, Michael Londregan, Luke Jones and Bob Monfrini. I am also grateful to my colleagues in tourism marketing who have contributed their insights and experiences in destination branding to this work. Their support has been invaluable in the development of the thesis.

Thank you also to my colleagues at James Cook University and Purdue University. Special thanks go to my supervisors, Laurie Murphy and Phillip Pearce, who have guided me through this journey of discovery. Their support, guidance and advice has enabled me to complete this journey of discovery.

Finally I would like to acknowledge the support of my wife, Jana Day and my children Samuel and Thomas. Their understanding during the writing of this thesis made the undertaking possible. They are my inspiration. This thesis is dedicated to them and to my mother and father who instilled in me a love of learning.



Abstract

Destination branding is an important focus of tourism marketing research and a cornerstone activity for many destination marketing organizations. National Tourism Branding is the specific activity of destination branding a nation to encourage tourism. This study examines National Tourism Branding from two perspectives. National Tourism Branding is examined from the perspective of the National Tourist Office (NTO) operating in the United States. The thesis also examines the National Tourism Brand (NTB), and the role of the National Tourism Office, from the perspective of commercial stakeholders in the brand development process. The study examines the attitudes of both tourism product and wholesalers to the branding process.

This thesis began by exploring the phenomenon and process of branding with particular focus on the way branding is applied to nations and destinations in tourism marketing. The literature review examined the complex nature of destination brands noting that destination brands typically exist within a hierarchy of "place brands" and that destination brands exist in portfolios of brands due to the composite nature of destinations themselves.

The role of stakeholders in the destination branding process was also reviewed in detail. Tourism Destinations, as composite entities with component products, have stakeholders concerned in the development of effective master branding of the destination. In addition, distribution channel members, reliant on the destination for business, are also stakeholders in the

brand development process. In addition to "market driven" stakeholders destination marketers must also engage with "non-market driven" stakeholders including local residents, government and politicians. The literature review identified National Tourist Offices (NTOs) as the key drivers in the development of National Tourism Brands (NTB) and examined the activities of these organizations in the destination marketing and branding process. The process of destination branding was reviewed and compared to the general process of branding undertaken by consumer products. The development of brand strategy requires an assessment of the destination's image, the development of a destination brand identity and the creation of a positioning strategy designed to meet brand and communications objectives. These activities are undertaken in the context of a specific target market.

Destination brands are developed for the purpose of delivering benefits to the destination. The destination branding process is designed to increase the "brand equity" of the destination brand. Destination Brands can be described as public assets shared by the community and the tourism industry. As such the development of brands, while critical to National Tourist Offices is also an important issue to other users of the asset including tourism product and tourism intermediaries, both of which invest funds to promote the destination as part of their commercial offerings. The measures for assessing the value of the destination brand and its effectiveness in the market place are examined in the literature review.

Chapter 2 examines the development of "Brand Australia" in the United States and reviews the Australian Tourist Commission's marketing campaigns during the period 1996-2004. The thesis explored the way ATC used the Olympic Games held in Sydney in 2000 as both a catalyst for the development of Australia's National Tourism Brand and as a brand partner, effectively co-branding Australia with the Olympics. The second section of Chapter 2 examined how the ATC engaged with partners in the development of the brand during this period. As a result of the literature review a series of key study areas were developed to address the nature of National tourism branding with particular focus on the activities of US based National Tourist Offices and the impacts on commercial stakeholders of National Tourism Activity. Within this framework three studies were undertaken to better understand the role of National Tourist Offices in the United States. Chapter 3 examines the results of these studies which focus on destination marketing and branding activities.

As a result of the studies it was noted NTOs operating in the United States are relatively small operations, with modest levels of resources – both human and financial. Nevertheless, these organizations are tasked with significant goals and are committed to marketing to consumers in the largest most complex marketplace in the world. These NTOs consider destination branding an important activity that raises the profile of their countries, increases their marketing efficiency and effectiveness as well as those of their commercial stakeholders. These NTO operations in the United States have considerable freedom to interpret their brands in the market. They leverage their partners

through both the use of industry input into strategy development and cooperative marketing. The NTOs perceive the greatest benefit of their brand activity is to provide a focused message to consumers while allowing partners to focus attention on sales/conversion activity.

In order to better understand the impact of destination branding on the NTO and commercial stakeholders three additional studies were conducted. Study 4 was a two part content analysis which included analysis of ATC motivational brochures to examine the execution of brand positioning and an examination of tour wholesaler's brochures. This analysis revealed that the NTO was able to devote both imagery and written copy to develop a brochure that provided both specific detail as well as a "holistic" impression that was consistent with brand values. The commercial brochures however relied heavily on images of the destination to convey brand values and so were limited in their ability to communicate the brand.

Study 5 examined in detail the experience of two "market driven" stakeholder groups involved in the Australian branding process. As Australia's NTO, the Australian Tourist Commission has government authority to promote Australia's tourism brand and the ATC is committed to the success of the tourism industry. It was therefore instructive to examine the perceptions of Australia's tourism providers and their channel partners of the Australian tourism brand, and it's utility in generating passengers. This study found that both tourism product and their distribution partners, the travel wholesalers, are relatively small organizations with limited resources to achieve their marketing

objectives. These organizations value the contribution of "Brand Australia" and consider their individual company's performance is tied to the effectiveness of the brand Australia. These organizations perceive the greatest benefit they receive from Australian tourism branding is the ability to allocate resources to sales messages about their specific product offerings rather than to "back ground" information on the destination itself. Interestingly, despite their enthusiasm for Brand Australia these organizations perceive factors other than the ATC's marketing activity drive the consumer buying process. In particular they attribute the greatest impact on raising awareness of the destination and creating desire to travel to "word of mouth" factors.

The brand hierarchy of the National Tourism Brand often includes state and regional branding. In order to explore issues that occur when different destination marketers work with the same brand hierarchy a survey (Study 6) of leaders of Australia's State Tourism Organizations (STOs) was conducted. This study revealed general alignment of branding objectives but concern that the various organizations involved in marketing Australia in the United States should invest greater energy in developing complementary brand strategies.

In addition to the findings of the research several key insights have been generated in the development of this thesis. Firstly, it was noted NTB plays a variety of roles the in the brand architecture of the destination including "master brand", "umbrella" brand and "driver brand". It notes that due to the composite nature of destinations, destination brands can be considered as both a single brand and as a portfolio of component brands. The thesis also

noted that the variety of stakeholders involved in the development of the brand as a public asset requires a that valuation of the benefits of the brand include not only benefits that accrue to the DMO or to the consumer but to the broader group of beneficiaries including the distribution network, the destination's component products and the community to name a few. Finally it has also been noted that sustainable destination branding, despite the tendency of research to focus on only marketing issues, requires both marketing communication strategies and destination development strategies.

Topics from this study were presented at the International Conference on Destination Branding and Marketing for Regional Tourism Development, 2005.

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Frequently Used Abbreviations

ATC	Australian Tourist Commission
CVB	Convention and Visitors Bureau
DMO	Destination Marketing Organization
EAV	Equivalent Advertising Value
NTO	National Tourist Office
NTB	National Tourism Brand
RTO	Regional Tourist Office
STO	State Tourist Office