

Marketing research

Where is research going? I think right now it's heading nowhere slowly. Many clients use research as a crutch . . . research is used for analysis and information . . . it's not used for insight. It's operating at about 30% of its potency.

Kevin Roberts, CEO Saatchi & Saatchi

Aims

The aim of this chapter is to enhance understanding of:

- the marketing research process
- exploratory, descriptive, and causal research
- limitations of marketing research.



Perspective

DMOs play two key roles in marketing research. Firstly, a marketing orientation dictates a focus on understanding consumer needs, and so the DMO must collect information to enable effective decision-making relating to the destination marketing process. Secondly, the DMO acts as an information clearing house to assist stakeholders with their own marketing decision-making. The chapter focuses on the six-step marketing research process, beginning with identification of the management decision problem (MDP) and culminating in the reporting of information to enable effective decision-making. DMOs, particularly at the RTO level, rarely have the time and/or financial resources to undertake necessary marketing research in all markets of interest to stakeholders. So, trade-offs must be made. Decisions must often be made at speed, without the benefit of full information. No marketing research design is perfect therefore. Each project will have limitations, and so it is important for destination marketers to develop skills to be able to critique the validity of the research approach used.

Why conduct marketing research?

Marketing research has been defined as (Malhotra et al., 2006, p. 5):

The systematic and objective collection, analysis and dissemination of information for the purpose of assisting management in decision-making related to the identification and solutions (and opportunities) in marketing.

Clearly, any destination marketer with a market orientation (see Chapter 1) requires a process for staying in tune with consumer-travellers in target markets and gaining insights into the why of buy, to generate information that will aid future decision-making, both for the DMO and for stakeholders. Information reduces uncertainty and so is necessary at each stage of the marketing process from the environmental analysis and planning (see Chapter 8) through to implementation and ultimately performance evaluation (see Chapter 19). Access to the right information enables more effective marketing decision-making.

Times have certainly changed in terms of marketing research adoption by DMOs. Someone involved in the early days of regional destination promotion confided to me during an in-depth interview that many of her resort destination's promotions in the 1960s and 1970s were developed 'over a bottle of gin at two in the morning'. From my own experience in New Zealand I know that most RTOs there only became serious about developing a marketing research programme around the late-1990s. But even then the function was rated secondary to other marketing activities, with one RTO marketing manager admitting to me: 'As you know Steve,

research is always the first to get cut in the budget planning.’ Around the same time in the USA, Hawes et al. (1991) found that only 10 out of 37 USA STOs commissioned market research on a regular basis. In the UK, Bramwell and Rawding (1996, pp. 213–214) noted the lack of research used by destination marketers there. They cited the following comment by the CEO of a Convention and Visitor Bureau on the development of a city image during the 1990s:

The image was chosen because it is the facts, it is the reality. We did no market research to create an image . . . We promote the facts, we don't go in for gimmicks.

In examining the priority of research for CVBs in the USA, Masberg (1999) found that the activity was regarded as essential for improving productivity, and yet the bureaus were devoting little time or funding. For example, the person responsible for research was more likely to hold a management position rather than hold the title of research manager, and almost 80% of respondents indicated spending less than 10% of their time on research. Masberg (p. 38) summarised the research findings as ‘grim and bleak’. Similarly, in an investigation of the perceived importance of research in Austria by the NTO and RTOs, Dolnicar and Schoesser (2003) found:

- an underestimation of the importance of market research
- minimal research budgets relative to promotional spend
- a lack of formal criteria for evaluating market research needs
- a lack of coordination between research and marketing staff.

Increased competition and greater access to information have contributed to increased marketing research activity by DMOs at all levels. Case Study 9.1 provides an example of a sizable CVB marketing research project, where much was at stake in terms of decision-making based on information generated.

Case study 9.1 Gateway Calgary: Research-driven strategies

Tracey Grindal, Market Research Manager, Tourism Calgary

Gateway Calgary was a research study initiated and project managed by Tourism Calgary on behalf of seven industry partners. The goal of the study was to identify lucrative product-market linkages within the Calgary region’s tourism industry from which to develop, package, and promote product clusters. The results are guiding Tourism Calgary’s marketing and strategic planning through to 2008. The study began in 2004 and concluded in summer 2005.

Gateway Calgary was a four-phased project. Phase one, information collection, included a thorough scan of Calgary’s tourism industry inventory to identify areas of critical mass and

gaps in tourism product offerings and an analysis, using demographic as well as psychographic and behavioral tools, of Calgary's current geographic and product-based markets. In phase two, 10 developing and emerging products on which to focus marketing effects in the near and long-term were identified. Phase two identified 10 potential market segments for Calgary and area. Of the 10, three were identified as having immediate potential, which were (1) Western Heritage, (2) Information, and (3) Sport/Major Event Tourism. In phase three, industry was consulted to gather their input, feedback and support of the three segments. Phase four, sustainable implementation, continues to be the most important phase of the project. It involves the focused, strategic marketing of the right products to the right demographics.

To-date, several initiatives relating to the three segments have been completed or are underway. Under Western Heritage, media marketing has been increased on Western heritage and culture. The 'West' messaging and the brand, Experience Calgary Heart of the New West, are used throughout Tourism Calgary's marketing and sales initiatives. Four different Western Heritage experiences – the Old West, the Real West, the Wild West, and the New West – were developed based on the research.

Under Information, Tourism Calgary partnered with the City of Calgary and the Calgary Tower to open a new Visitor Information Centre that services both visitors to Calgary and Calgary residents. Other initiatives include provincial accreditation of visitor information centres and improved visitor-friendly highway signage.

A major component of the Sport and Major Event segment was the development of the Calgary Sport Tourism Authority (CSTA). The CSTA is a volunteer committee of senior level Calgary executives whose purpose is to review and ultimately decide whether to support sport and major event opportunities for Calgary by taking a look at the economic, social, and environmental impacts and merits and its 'fit' with Calgary. In just two short years Tourism Calgary and its partners have made great strides in this area, confirming the 2006 World Figure Skating Championships, 2007 North American OutGames, and the 2008 JUNOS.

Discussion question

How does the Gateway Calgary project relate to the definition of marketing as described in Chapter 1?

Further information

www.tourismcalgary.com

Information clearing house

A key function for DMOs is acting as an information clearing house for local stakeholders, potential investors and developers. The majority of tourism service providers are small family-owned businesses with minimal marketing budgets. DMOs can enhance decision-making of small businesses by providing links to market intelligence and other useful information. Table 9.1 lists the key elements in Ritchie and Crouch's (2003) model of DMO information management.

Table 9.1 Inward and outward flows of DMO information

Inward flow of information	Outward flow of information
<ul style="list-style-type: none"> • Evolving research methods • Impacts on tourism policy • Environment scanning • Monitoring competitors • Monitoring performance • Monitoring markets • Destination image • Monitoring sector performance • Monitoring visitor impacts • Visitor feedback • Internal destination information • Internal DMO information 	<ul style="list-style-type: none"> • To investors and developers • To members • To visitors • To community stakeholders

In practice

For an example of a comprehensive research clearing house see Tourism Queensland's corporate site (<http://www.tq.com.au/research/index.cfm>). The site provides summary fact sheets about key markets and trends, as well as more detailed reports and links to other tourism research providers. Information on the site is freely available. Also in Australia, Tourism Research Australia (www.tra.australia.com) made the move in 2006 to providing fact sheet research summaries, in an effort to appeal to a broader range of stakeholders.

The marketing research process

As future managers, it is important for students of destination marketing to develop a good understanding of the marketing research process, even though many might view the topic as being as scary as management accounting due to an aversion towards anything involving numbers or statistics. My question to any student aspiring to a marketing or management position who tries avoid these topics is this: *When you are responsible for business decision-making, how can you trust what the accountant and marketing researcher are advising you if you don't have an understanding of the basic concepts?* After all, you will be making decisions that involve their input.

What will be particularly valuable is an understanding of the advantages and disadvantages of the various research techniques in relation to the decision problem. Marketing research is increasingly being criticised about its effectiveness, for (1) techniques being selected on the basis of economic

efficiency rather than tailored to address a specific problem, and (2) using metrics designed for previous generations that are no longer effective in the Internet age.

In addition to general marketing research texts (see, for example, Aaker et al., 2007; Churchill & Iacobucci, 2005; Malhotra et al., 2006; Zikmund & Babin, 2007) and tourism research texts (see, for example, Jennings, 2001; Veal, 2006), a useful resource is Ritchie, Burns and Palmer (2005), who edited a 17-chapter text on the applicability of various research approaches to tourism. Each chapter has been written by a researcher who has applied the approach in a tourism setting, including for example: Delphi forecasting, depth interviews, mystery shoppers, action ethnography, case studies, focus groups, and content analysis. The text by no means addresses all available research techniques, but it is hoped that the concept will be expanded in the future.

Some types of information required by managers will be informal or indirect in nature, such as the feedback from suppliers dealing directly with visitors and non-visitors. Other aspects will be generated by more formal and direct means, such as intercept surveys of visitor at information centres. There is a place for both types of information in decision-making. Gut feelings or intuition from those on the frontline of tourism services is valuable for some decision-making. For example, the ANZCRO case in Chapter 15 discusses the development of a marketing joint venture based on both research and practitioner experience.

Generally, the more complex the decision the more detailed the information required and this requires a systematic approach. What is important is that the information generated for decision-making purposes has the following qualities (Malhotra et al., 2006): relevance, accuracy, reliability, validity, timeliness, and efficiency.

Marketing research is a six-step process, as highlighted in Figure 9.1. It is important to note that this is not a linear process that stops at step 6. Rather the process is ongoing in a circular manner. In this way, the conclusions in step 6 lead to the identification of new problems and/or opportunities.

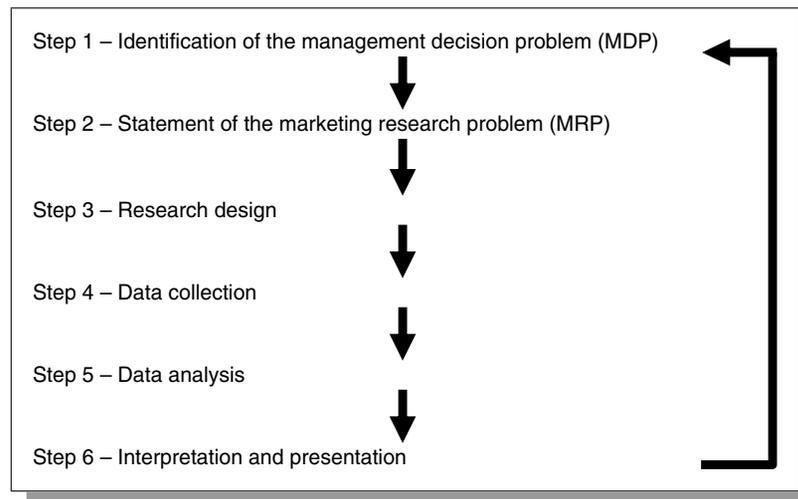


Figure 9.1
Marketing research process

Management decision problem (MDP) and marketing research problem (MRP)

The first stage in marketing research involves identifying and articulating the management decision problem (MDP). The MDP is a short statement summarising the problem or opportunity facing management. In this section, the terms opportunity and problem are used interchangeably. An example is whether to use the destination's general brand positioning theme when entering a new market such as China. This is a potential marketing opportunity, but represents a decision problem requiring information to design a course of action such as retaining or modifying the theme for the new markets or in markets with English as a second language such as in the case of Tourism Australia's controversial *Where the bloody hell are you* campaign in 2006.

While all steps are important, it is essential that the MDP and MRP are clear, because it is these that lay the foundation for the remaining steps. The MDP is typically expressed as action-oriented, focusing on a practical marketing decision. The type of information required for the decision is then guided by a marketing research problem (MRP) statement. The aim is to focus the researcher's attention on the information required to address the MDP. The MRP usually features a broad statement about the construct of interest, which is then broken down into more manageable research objectives.

The brief • • •

Usually a brief would be provided by management for the marketing researcher, much in the way a client's brief would guide an advertising agency. For example, Appendix 9.1 is a real world 'Request for proposals' (RFP) distributed by Tourism New Zealand in 2005. The RFP invited marketing research firms to submit research design proposals. The MDP and MRP are not necessarily explicit in these documents. In this case, the MDP could read: Is the brand positioning theme still relevant/appropriate in our major markets? Or, does the brand positioning theme need to be changed? This clearly identifies the action/decision faced by management. The MRP to address the MDP could then feature the following broad statement: How is New Zealand positioned as a holiday destination in each major market? The key construct of interest here is market position. This would then be supported by a series of questions to guide the collection of information that would measure this construct, and therefore enable management's decision.

Research design

The research design sets out the procedures for collecting the required information. Important considerations include (Malhotra et al., 2006, p. 21):

- definition of the target population
- methods of collecting qualitative and quantitative data
- sampling process and sample size

- measurement and scaling procedures
- questionnaire design
- data analysis approach.

The value of mixed methods • • •

Clearly, the level of available resources will dictate the scope and limitations of the research design. Importantly, the focus must remain on designing the collection of information to address the MRP and therefore the MDP. In many cases, the most effective research designs will employ mixed methods, which combine both qualitative and quantitative techniques. Figure 9.2 helps to demonstrate the value of mixed methods. In short, quantitative techniques offer the potential to provide a broad scope of data from a large and representative sample of the population. However, the data is quite shallow given that it is only in the form of numbers. Qualitative techniques on the other hand are not designed to provide a breadth of data, and so the scope is quite narrow with only a small unrepresentative sample of the population. However, qualitative data, in the form of a transcript of the participant’s conversation, for example, provides a greater richness and depth of insights.

Qualitative research uses an inductive approach, where the phenomena of interest are observed and then a conclusion or theory is subjectively interpreted. Quantitative research uses a deductive approach, in which hypotheses previously developed from theory are objectively tested through data collection. Qualitative techniques are useful in exploratory research, while quantitative techniques are used in descriptive and causal research designs.

Exploratory research design • • •

Exploratory research is useful when the nature of the problem/opportunity is not fully understood. This is common at the situation analysis stage of marketing planning. Exploratory research approaches might be used

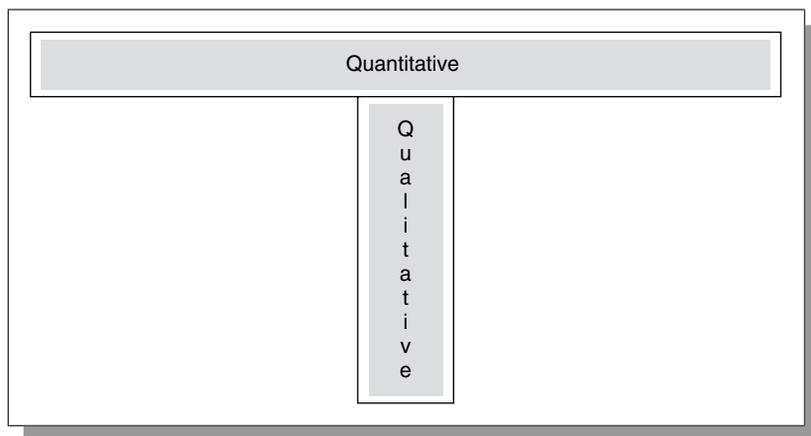


Figure 9.2
The breadth and depth of mixed methods

to diagnose a situation, to screen alternatives, or to discover new opportunities.

Information generated in exploratory research may be in the form of either primary or secondary data. Primary data is originated for the purpose of addressing the MRP. Secondary data on the other hand is that which has been previously collated for purposes other than the current MRP. For example, primary data collected by the DMO and placed on a website for general viewing will become secondary data for those third party organisations accessing it. The first port of call in any research project should be to check secondary data sources in an effort to see if information already exists to address the MRP. The wide range of external secondary data sources of interest to DMOs include:

- government statistics, such as the national/regional census
- tourism industry association reports, such as by the WTTC, WTO, PATA, and IACVB
- specialist industry reports, such as those by Euromonitor
- the academic literature
- the news media
- syndicated marketing research services.

Construct/concept • • •

Effectively defining the construct (also referred to as concept) of interest helps the research team to develop a research design that will effectively measure the construct. Common marketing research constructs of interest to DMOs include brand image, brand awareness, market position, consumer attitudes, and visitor satisfaction. The academic literature review at this stage is particularly useful as it enables the researcher to identify how others have conceptualised (defined) and then operationalised (measured) the construct. In other words, what is the current extent of knowledge? Verbal, graphical, or mathematical models provide a guide to otherwise complex concepts. For example, a common DMO research objective is to identify whether a marketing initiative has resulted in increased awareness of the destination and intent to visit. From a review of the consumer behaviour literature, Fishbein and Ajzen (1975) proposed that any question exploring the relationship between attitude and behaviour must include the following characteristics:

- the behaviour (in this case a holiday)
- the target object at which the behaviour is directed (destinations)
- the situation in which the behaviour is to be performed (type of holiday)
- the time at which the behaviour is to be performed (e.g. in the next 12 months)

These are then incorporated in the following question designed to measure unaided awareness: *Of all the destinations available to you for your next family holiday, which one first comes to mind?* The response to this question can be regarded as qualitative as it will be elicited unaided by the participant.

Although quantitative techniques can be engaged in exploratory research, such as in a pilot study, it is more common for qualitative techniques to be employed. A summary of some qualitative techniques, potential applications, and destination marketing references is provided in Table 9.2.

Qualitative techniques are particularly effective at the questionnaire design stage, in that they aid the researcher in constructing questions and scale items that are relevant to the target group. Following a questionnaire, qualitative techniques can again be useful in helping to clarify any emergent issues and gain in-depth feedback relating to the findings.

Table 9.2 Qualitative approaches

Approach	Applications	Destination marketing references
Focus groups	Stimulating interaction between 8–12 participants at a time in a free-flowing discussion to: <ul style="list-style-type: none"> • define problems • understand opportunities • screen ideas • brainstorm • interpret prior quantitative results 	Mackay & Fesenmaier (1997) Perdue (2000)
Depth interviews	An unstructured or semi-structured conversation with a single participant, to: <ul style="list-style-type: none"> • elicit expert opinion • discuss sensitive topics • gain a greater depth of insights 	Pike (2003) Hudson & Shephard (1998)
Repertory grid analysis	A structured personal interview, commonly using the triad card method, to elicit the dimensions by which the participant differentiates objects such as a competitive set of brands	Pike (2003, 2007) Riley & Palmer (1975) Embacher & Buttle (1989) Young (1995) Walmsley & Jenkins (1993)
Q methodology	A personal interview using a sorting process of a list of statements to gain insights into the participant's meanings and opinions	Fairweather & Swaffield (2001) Stringer (1984)

Descriptive research design • • •

The aim of descriptive research is to describe the characteristics of the phenomena or population of interest. This approach, which takes place after the problem/opportunity has been clearly identified, has been the most popular in the destination marketing literature (see, for example, Research Snapshot 9.1). Descriptive research designs generally employ the use of questionnaires, where numbers are assigned to responses. Observation methods can also be used but are rarely reported in the destination marketing literature. Quantitative techniques are employed to generate findings from a representative sample that can be generalised to the wider population of interest.

Research snapshot 9.1 Destination image by the numbers

The first studies of destination image were reported in the literature in the early 1970s. In the time since, the field has grown into one of the most popular topics for tourism researchers. In a review of 142 destination image papers published in the literature between 1973 and 2000, it was found that the vast majority of papers (114) used quantitative methods to measure the construct. Less than half of the papers reported the use of qualitative methods at any stage in the research. The paper is a useful guide for destination image researchers, as it tables the approaches used in each of the 142 studies.

Source: Pike, S. (2002). Destination image analysis – A review of 142 studies between 1973 and 2000. *Tourism Management*. 23(5): 541–549.

Key attractions of questionnaires to destination researchers include:

- a standardised instrument can be used by multiple interviewers
- ease of administration of large samples
- relatively low cost, particularly using internet-based applications
- large geographic flexibility
- availability of data analysis techniques
- the ability to generalise results to the wider population of interest.

Essentially there are three aims of a questionnaire. The first is to translate the information required in the MRP into a set of questions. A questionnaire is only as good as the questions asked. The second aim is to encourage participants to participate and to complete the questions. A well-constructed questionnaire appears simple and focused, and yet will have been developed through careful preparation and pre-testing. Wording of questions should be jargon-free and designed in the language of the participant. Other key issues relate to: the use of incentives; order of questions; selection of response scales; placement of sensitive questions; cover letter; ethics; and avoiding leading questions, ambiguity and double-barrelled items. The third aim is to minimise response error. Response bias

occurs when participants answer questions in a way that either deliberately or unconsciously misrepresents the truth. Deliberate falsification can manifest through: acquiescence bias, extremity bias, interviewer bias, auspices bias, and social desirability bias. Unconscious misrepresentation can occur when participants are unable to recall information, such as travel motivation (see, for example, Crompton, 1979), or simply don't know (see Research Snapshot 9.2).

Research snapshot 9.2 Avoiding uninformed responses

Even though destination image has been one of the most popular research topics in the tourism literature, there is no commonly agreed conceptualisation of the construct. As shown in Research Snapshot 9.1, the majority of studies have used structured questionnaires for measurement. There has been criticism that the way in which some researchers have selected the questionnaire scale items means a greater likelihood of some questions being irrelevant to participants (see, for example, Dann, 1996; Pearce, 1982). This then runs the risk of stimulating uninformed responses. This paper suggests that the use of a 'Don't know' (DK) option for scale questions provides participants with an alternative to skipping the question, using the scale midpoint to denote neutrality, or guessing. Of the 114 studies of destination image studies, using questionnaires, tabled by Pike (2002), none explicitly reported the use of a DK option. This paper reported that in the trial of a DK option in two destination image questionnaires. In both studies, there was a very high take-up by participants for some attributes. These results provided practical implications for the DMOs, as they highlighted information that would not have been identified without the use of the DK option.

Source: Pike, S. (2008). Destination image questionnaires: Avoiding uninformed responses. *Journal of Travel & Tourism Research*. (In press).

Causal research design • • •

Experiments can be used to analyse causal relationships between variables. Independent variables (e.g. price) are manipulated to test the effect on a dependent variable (e.g. sales). While this research approach provides the greatest degree of certainty for marketers, the complex and expensive nature of experimental designs has meant that it is the least common in the tourism marketing literature. Causal relationships are extremely difficult to prove because of the difficulty in isolating and controlling the wide range of extraneous variables in the real world, which could also impact on the dependent variable at the time of the experiment. For example, in an experiment involving the manipulation of DMO advertising spend (independent variable) to test the effect on intent to visit (dependent variable) in a target market, it would be impossible to control for extraneous variables such as competitors' advertising, terrorist acts, currency exchange rate fluctuations and so on. So at best, the research is only able to infer a causal relationship between the variables.

Sampling

The purpose of sampling is to invite participation from a portion of the population of interest. To survey the entire population requires a census, which is neither practical in most cases, nor required. Through a probability sample, where every member of the sample frame has an equal and known chance of selection, the goal of a quantitative approach is to draw a sample of participants whose characteristics closely match those of the census population. There will always be a degree of sampling error, because the data generated from a sample will by chance vary in some way from that of a census. An effective sampling plan results in data that can be generalised to the wider population of interest. Destination marketing studies commonly draw a sample from consumers in the market of interest or from visitors at the destination. The question of sample size is important, and will be dictated by issues such as: the budget, the importance of the information, statistical analyses requirements, and level of confidence. Readers will find a useful discussion on sample size determination by Baker et al. (1994).

In qualitative studies there is no rule regarding sample size (Patton, 1990). One approach is to sample until a point of data redundancy is reached. That is, the addition of any new participants will not yield any new insights. However, the research will always be interested in ensuring participants are selected purposefully, on the basis of being knowledgeable about the phenomena, having the ability to articulate, and representing a diversity of opinions.

Data collection and analysis

The data collection stage must be carefully managed to minimise potential systematic error, particularly when a team of interviewers is employed to undertake field or telephone interviews. Decisions must be made about when to collect data, as well as how to communicate with participants. The data analysis techniques selected will depend on the nature of the information required to address the MRP and therefore the MDP. There are commonly two main aims of data analysis. The first is to identify any significant differences between groups within the sample. For example, *t-tests* can be used to identify differences in perceptions held by two groups such as males and females, and *analysis of variance* (ANOVA) can be used in the same manner for more than two groups, such as by education levels. The second is to investigate relationships between variables. For example, *exploratory factor analysis* might be used to reduce a long list of attribute scales into a small subset of core themes, while *regression* can be used to identify relationships between a dependent variable and a set of independent variables.

Interpretation and presentation

Interpretation is the 'so what' stage. 'So... what does this information mean in relation to the decision-maker's problem?' This involves the use

of both critical and creative thinking skills, regardless of whether the data is of a qualitative or quantitative nature. Findings need to be presented in a way that not only demonstrates the validity of the approach, but most importantly focuses on addressing the MDP and MRP.

In Chapter 1, the divide between tourism academics and practitioners was discussed, along with the call for marketing researchers to better market themselves and their work. The same challenge exists in the marketing research world in general. Marketing researchers are often left wondering why their findings are not always incorporated into marketing actions. In a 2007 Australian Market & Social Research Society seminar to address this issue, guest speaker Tiina Raikko, Consumer Insight Director for Unilever Australasia, offered these views:

- Why do we assume others will find our data as intrinsically interesting as we do?
- To engage marketers requires bringing the research to life
- Delivery is worth as much as the content
- As a marketing researcher you are useful when you know the business as well as the client, but know the customer better.

Limitations of marketing research

The opening quote in this chapter made by the worldwide CEO of Saatchi & Saatchi advertising, Kevin Roberts (see www.saatchikevin.com), provides an insight from someone in the ideas business of the difficulty in gaining an understanding of consumer thinking. Roberts is not alone in his criticism of the failure of marketing research to deliver effective consumer insights, and so it is appropriate to introduce some of the limitations of research. IMC pioneer Professor Don Schultz (2005, p. 7) offered these strong words:

Marketing is in trouble because marketing research is in trouble. No, make that, today marketing research is in a death spiral and its taking marketing down with it . . . Research is supposed to present the voice of the customer. Today, it doesn't.

Critics of current marketing research practice argue that there is an over-reliance on certain techniques that are selected on the basis of cost and familiarity rather than to gain a deeper understanding of how consumers really think. So much research is based on attitudinal data. That is, questionnaires and focus groups that provide data in the form of participants stating what they say they do and what they might do in the future. Comparatively little research generates behavioural information, analysing what people do rather than what they say they will do. The high failure rate of new products has been blamed in many cases on the reliance on flawed focus group research with a strong acquiescence bias. Such bias occurs, for example, when it is easy for participants to say they like the proposed product. This is because they are in a research situation and not a real buying situation. The failure of New Coke and Crystal Pepsi highlight

how even the largest of research projects can get it wrong. Research Snapshot 9.3 heeded the call of Schultz and Schultz' (2004) call for researchers to link attitudinal and behavioural data through longitudinal studies. This research investigated the relationship between stated destination preferences and actual travel.

Research snapshot 9.3 Combining attitudinal and behavioural data

There have only been a small number of applications of consumer decision set theory to holiday destination choice, and these studies have tended to rely on a single cross-sectional snapshot of research participants' stated preferences. Very little has been reported on the relationship between stated destination preferences and actual travel. To what degree then can marketers rely on consumers' stated attitudes if there is no comparative measure of actual behaviour? This study presented a rare longitudinal examination of destination decision sets, and the first in the context of short-break holidays by car in Queensland, Australia. Two questionnaires were administered, three months apart. The first identified destination preferences while the second examined actual travel. The findings indicated a general consistency between attitude and behaviour in the short term, and support Pike's (2002) proposition that the positioning of a destination into a consumer's decision set represents a source of competitive advantage:

- In terms of unaided top of mind awareness (ToMA), participants elicited over 100 short-break destinations within driving distance of Brisbane. Brisbane residents are literally spoiled by choice of contiguous destinations.
- Participants indicated a mean of only four destinations in their short-break decision set. This has implications for those destinations not included, particularly in light of the competition mentioned in the previous point.
- There was a strong link between stated destination preferences and actual travel. Almost 75% of participants who took a short break during the study visited at least one destination from their stated decision set.
- Familiarity with preferred destinations was apparent, with 92% of participants indicated having previously visited their ToMA destination.
- Intent to visit the destination of interest was significantly higher from previous visitors than non-visitors.

A key implication for destination marketers is the recommendation to monitor decision set composition, which represents an important and practical indicator of future performance.

Source: Pike, S. (2006). Destination decision sets: A longitudinal comparison of stated destination preferences and actual travel. *Journal of Vacation Marketing*, 12(4): 319–328.

Rarely would any marketing research design be regarded as perfect. Usually, due to resource constraints such as insufficient time and/or money, every project will have limitations. It is important that such limitations are acknowledged in the final report. Case Study 9.2 describes exploratory research, which also helps to demonstrate the value of surveying non-users

of a service, in addition to users. In this case, surveying non-users identified significant barriers by travellers to wine tourism in New Zealand. However, as with every exploratory research project, the research does have limitations.

Case study 9.2 Wine tourism: investigating differences between users and non-users

Abel D. Alonso, Edith Cowan University, Western Australia

The world-wide wine tourism phenomenon has gained in popularity in New Zealand as an additional activity for those travelling to rural areas, which is where most wineries are located. Wine tourism includes visiting wineries (O'Neill, Palmer, Charters & Fitz, 2001), cellar doors (Cambourne, 1998), or tasting the wine product (O'Neill, Palmer & Charters, 2002), often in combination with food offered at the winery. Some studies suggest that wine tourism provides an additional travel motivation (Macionis & Cambourne, 1998), while others see it as a critical aspect of the travel experience (Jago, Issaverdis & Graham, 2000).

Today, New Zealand has over 500 wineries (Wine Institute New Zealand, 2006), which are located in ten main wine regions. Efforts that include organising wine festivals and creating internet websites have been undertaken both nationally and regionally to enhance and market the appeal of the wine regions (see, for example, www.wine-marlborough.co.nz/). Recent international success of several New Zealand wines (Foodworks, 2006a, 2006b) has helped boost the reputation of the nation's wine industry.

While many studies focus on winery visitors, their characteristics and consumption patterns, little is known about the involvement with winery visitation among travellers in New Zealand. Recent figures about wine trail and vineyard visitation indicate modest involvement among domestic travellers, which was less than 1% in 2005 (Ministry of Tourism, 2006a), and international travellers. However, the percentage of international wine trail and vineyard visitors has increased from 1.5% in 1998 to 10% in 2006 (Ministry of Tourism, 2006b). Another area of limited knowledge is how people travelling in New Zealand view winery visitation. This dimension is particularly important to enhance the appeal of wine tourism as an alternative attraction to individuals travelling in the country.

During late-2006, exploratory research was undertaken to analyse differences in attitudes towards wine tourism by users and non-users. A total of 998 individuals travelling from the North Island to the South Island of New Zealand were invited to participate. In all, 500 responses were obtained.

Just over half (56%) of participants advised they had visited a New Zealand winery. The sample therefore provided a balance between users and non-users. The most important reasons for visiting wineries are 'to drink wines,' 'to socialise', and 'to eat.' For international non-users, 'I don't know much about New Zealand wineries,' and 'I don't know much about New Zealand wines' were clearly their main motives for not visiting wineries. In contrast, the domestic travellers' main reason was 'because I can easily buy wine/food elsewhere,' followed by 'I am not interested in winery visitation.' Interestingly, 'because I don't drink wine' was the least important reason among respondents not to visit wineries. The results show clearly that more work is required to raise the profile of wine tourism regions among both international and domestic visitors. The aspect of socialising, indicated by participants as one of their main reasons for visitation, and the peaceful/rural setting of the wineries identified in

several studies (see, for example, McRae-Williams, 2004), suggest that there is much more to winery visitation than the wine/food product. Destination marketing strategies could also be implemented to educate domestic travellers and change the current views among members of this group of winery visitation as simply being an activity to buy wines or food.

Discussion question

What questions would you ask the researcher to determine possible limitations of the findings?

Further reading

Alonso, A.D., Fraser, R.A. & Cohen, D. (2007). Does age matter? How age influences the winery experience. *International Journal of Culture Tourism and Hospitality Research*. 1(2), forthcoming.

Alonso, A.D., Fraser, R.A. & Cohen, D. (2007). Investigating differences between domestic and international winery visitors in New Zealand. *International Journal of Wine Business Research*, 19(2), forthcoming.

The future of marketing research

The year: 2050. A baby is born. A small blood sample is taken with parental consent . . . and sent through to DNA screening. There the sample is tested for congenital abnormalities, future disease possibilities, criminal potential, and consumer segmentation. The results of the consumer segmentation are sent to subscriber companies around the world to be added automatically to their databases, which will predict behaviour for that person in terms of their combined demographics and DNA profile (Walkley, 2005).

The Managing Director of a leading Australian market research firm, Walkley (2005) believed current research into relationships between genetics and anti-social behaviour will lead to marketing research applications in the future. For example, identification of those with a higher propensity for being 'born loyal' will enable targeted segmentation in pursuit of brand loyalty.

While DNA based marketing research might or might not eventuate in the future, mind reading by neuroscience to test the effectiveness of advertising campaigns is already in practice. The potential of magnetic resonance imaging (MRI) technology, used by medical specialists to scan the body for diseases, to scan brainwave responses to advertising has been realised by the USA-based ideation consultancy Brighthouse. While the organisation's website (see www.thoughtsciences.com) carries endorsements by Fortune 500 companies such as Coca-Cola and in the travel sector from Delta.

Analysis of the brainwaves identifies at what points in a commercial such engagement occurs. The idea is to ensure brand imagery appears during the limited period of engagement. Clearly any technique that can achieve this will be welcomed by marketing researchers, who in the main

are relying on what consumers tell them through interviews and questionnaires. Alarcon (2006, p. 1) cited GAP Research's John Grono's view that researchers tend to ask consumers questions they can't answer: 'The limbic part of the brain that registers engagement and memory is non-verbal, you can't put it into words.' Neuroscience is already here and affordable for larger DMOs.

Key points

1. The marketing research process

The marketing research process involves six steps, beginning with the design of a management decision problem (MDP) and culminating in the presentation of information that will enable effective decision-making. It is important to remember that the process is cyclical rather than linear, so that the sixth step leads to the identification of a new MDP and so the process continues.

2. Exploratory, descriptive, and causal research

Depending of course on the MDP and marketing research problem (MRP), marketing research design will ideally incorporate both inductive and deductive reasoning, and therefore require a combination of qualitative and quantitative methods. The different strengths of the two approaches can provide much deeper insights into the why of buy when combined in a meaningful way.

3. Limitations of marketing research

No marketing research design will be perfect, and so it is important to develop an understanding of limitations in terms of validity and reliability. It is important that such limitations are stated explicitly in the report.

Review questions

- Examine the extent to which your DMO is acting as an information clearing house for stakeholders.
- For the TNZ CFP, produce a research design as if you were a consultant bidding to get the contract. Due to the large scale of this project, perhaps consider a research strategy for one of the markets of interest.
- Why is it often advantageous to sample non-visitors?

Appendix 9.1 Tourism New Zealand CFP

Tourism New Zealand

Consumer Perception Research 2005

REQUEST FOR PROPOSALS (RFP)

Tourism New Zealand invites proposals to undertake consumer research in the UK, USA, Australia and Japan to further refine and enhance the positioning of the 100% Pure New Zealand global marketing campaign.

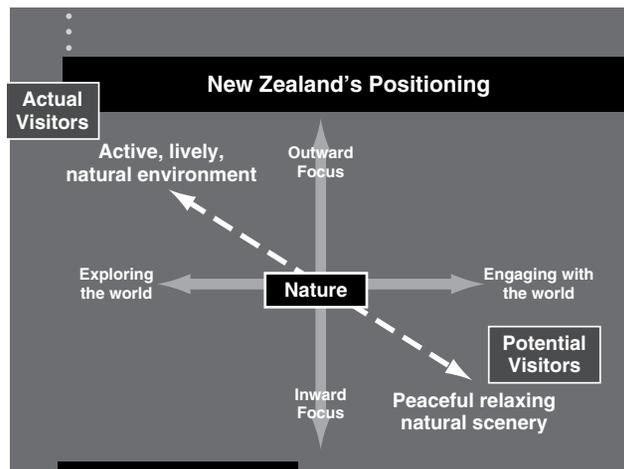
In 1998 Tourism New Zealand embarked on in-depth consumer research in Australia, USA, UK, and Japan to:

- understand the motivations of long haul travelers, and
- identify the most relevant, motivating, unique, and appropriate positioning for New Zealand as a holiday destination.

The results from this 'Foundation' research were pivotal in the initial and ongoing development of the 100% Pure New Zealand global marketing campaign launched by Tourism New Zealand in August 1999.

Framework for understanding the long-haul travel market

A key outcome of the Foundation research was the development of a framework for understanding the needs and motivations of the long haul travel market.



This framework aims to position long haul travellers in relation to the following questions:

- What are travellers looking for in long haul travel?
- What basic needs does the experience satisfy?

- How does New Zealand meet these needs?
- How can we use this knowledge to position New Zealand as a compelling holiday destination?

Research showed that, across all markets, *potential visitors* believed that a holiday in New Zealand delivered predominately to those seeking a quiet, relaxing holiday. In contrast, *past visitors* saw New Zealand as delivering exceedingly well to those with an energising need. Thus Tourism New Zealand needs to position New Zealand as a destination that offers an energising experience¹.

It is now six years since the Foundation research was commissioned. It is timely therefore to re-assess in-market travel dynamics and perceptions of New Zealand as a holiday destination to ensure that the 100% Pure New Zealand campaign continues to evolve, building an increasingly strong brand for New Zealand offshore.

To assess the most appropriate positioning for New Zealand in the USA, UK, Australia and Japan the research will need to:

- explore consumers' general perceptions of New Zealand, New Zealanders, and products and services of New Zealand origin
- determine how consumers perceive the personality of New Zealand
- identify icons that consumers associate with New Zealand and understand which have positive strengths that New Zealand could leverage
- identify which key messages and/or qualities would inspire consumers to think more positively about New Zealand
- examine the effect these perceptions have on New Zealand's competitive position as a tourism destination
- identify and understand the motivations of long haul travellers and Interactive Travellers®
- explore perceptions/attitudes towards travel to New Zealand
- understand the strengths and weaknesses of New Zealand's image as a destination
- identify the barriers to travel to New Zealand
- explore destination decision-making processes and opportunities for converting interest or intentions to visit New Zealand into actual travel
- identify the most relevant, motivating, unique, and appropriate positioning for New Zealand as a destination
- assess and enhance the current framework for understanding the needs and motivations of long-haul travellers.

Tourism New Zealand invites the proposer to put forward the best methodological solution for meeting the research objectives within the

¹ See Appendix 1 for a more comprehensive description of this framework. Individual research reports for each of the four markets included in this study can be viewed at: http://www.tourisminfo.govt.nz/cir_randd/index.cfm?fuseaction=36

available budget. The proposed methodology will need to consider the following:

- The target audience for this research is Long-Haul Travellers or Intenders – those who have travelled long-haul in the previous twelve months OR are likely or very likely to travel to long haul destinations in the next 3 years, and who are aged 18 or over (see Appendix 2 for details).
- The 100% Pure New Zealand campaign focuses its marketing activity on a selected target group of travellers that has been identified as New Zealand’s ideal visitor; namely the Interactive Traveller². At least 50% of research participants will need to be Interactive Travellers®. The Interactive Traveller definition will need to match the definition used for other commissioned TNZ research. (See Appendix 2 for details.)
- Research in Japan will need to be translated and undertaken in Japanese.
- At the survey stage, certain questions such as demographics will need to be consistent with the format used in previous TNZ surveys. The successful proposer will be provided with all relevant documents and survey questions used previously in Tourism New Zealand research.
- Research design phases will require input and feedback from key Tourism New Zealand personnel. This will need to be considered when planning the project timeline.
- The proposer will need to consider in-market events such as public holidays that might effect fieldwork timetabling.

A key output of this research is the development of a ‘conceptual device’ or analytical framework that Tourism New Zealand can assess performance of specific campaign elements in terms of positioning, appeal, and motivational response.

Reporting:

- One full research report including an executive summary and recommendations
- Four short reports focusing on research outcomes for each of the four markets – Japan, USA, UK, Australia .
- Presentation of research highlights to key Tourism New Zealand personnel (including power point or equivalent). This will involve a minimum of two presentations, one a presentation of results and workshop on findings and the other a final presentation.
- Provision of presentation material on Tourism New Zealand templates.

Up to \$400,000 NZD + GST

Proposals are due at Tourism New Zealand by 5 pm 28 January 2005.

² More detailed information about the Interactive Traveller is included in Appendix 2.

This contract must be completed by May 31st 2005 with a draft report submitted that date.

When tendering for this project we ask that you provide us with the following details:

Preferred research methodology

How the fieldwork and analysis will be undertaken detailing preferred sampling framework for qualitative and quantitative phases within the available budget.

Project plan/Timetable • • •

When research milestones will be met

Costs • • •

Costs itemised for each research phase and estimates of disbursements where applicable.

Key personnel • • •

Who will be involved in the project including references to skill base, relevant experience and qualifications.

References • • •

Evidence or examples of relevant work

Key contact • • •

Every proposal must include the name of the person to whom Tourism New Zealand may address any questions relating to the proposal.

Tourism New Zealand will be assessing proposals for this contract on the following basis:

- Evidence of an **in-depth understanding** of our requirements.
- Quality of the research design to provide a **comprehensive solution** to meeting the research objectives.
- Evidence of understanding of the **framework for understanding the needs and motivations of long-haul travellers.**
- **Prior experience** of conducting evaluation/communications research particularly in off-shore markets.
- **Quality of staff** put forward to conduct the assignment.
- Ability to supply **specialists** with relevant experience.
- **Price and value for money.**

Following preliminary consideration of the written proposals, Tourism New Zealand may invite one or more of the potential providers to meet

with the evaluation panel to present and discuss their proposal. Proposers must provide TWO complete copies of their proposals.

For supplementary information relating to this RFP, please contact the project manager:

Vaughan Schwass
Manager – Channel Marketing and Marketing Research
Tourism New Zealand
147 Victoria street west, Auckland
PO Box 91 893, Auckland Mail Centre
Email: vaughans@tnz.govt.nz

Please make no contact in relation to this RFP with any other Tourism New Zealand employee without the authorisation of the project manager.

The lowest priced or any proposal will not necessarily be accepted. Tourism New Zealand will not be under any obligation to discuss reasons why a proposal is accepted or rejected. No proposal is deemed to have been accepted or rejected until the fact of such acceptance or rejection has been notified in writing to the proposer by Tourism New Zealand.

The requirements specified in this RFP reflect those presently known. Tourism New Zealand reserves the right to vary, in detail, the final requirements.

Proposers must ensure that the person or persons nominated to negotiate a contract have the authority to finalise details without reference to others, either in New Zealand or overseas.

In relation to this RFP and consequential negotiations, only communications from the project manager and any person authorised by the project manager will be considered as an expression of Tourism New Zealand's position.

Preference will be given to proposals that meet all the conditions of the RFP. However, in the event that no proposal can comply with this, then consideration will be given to proposers answering part of the RFP.

If, in the opinion of Tourism New Zealand, none of the proposals are acceptable, Tourism New Zealand reserves the right to enter into negotiation with one or more proposers for a satisfactory offer, or with none of the proposers.

Tourism New Zealand will not be responsible for, or pay, any expense incurred by a proposer in the preparation of their proposal or in Tourism New Zealand's evaluation of it.

The acceptance of a proposal does not create any contractual relationship between Tourism New Zealand and the proposer but represents a commitment to enter into negotiations in good faith.

All prices must be in New Zealand dollars at the time of the response and be exclusive of GST.

All submitted proposals become the property of Tourism New Zealand and will not be returned to the proposer.

General information which is not specifically requested but which proposers wish to provide is to be attached separately and clearly labelled

‘Supporting Material’. Any reference in the proposal relating to this material must be specified.

All information contained in this RFP and all other information supplied by or on behalf of Tourism New Zealand to proposers will be treated as confidential, and may only be used for the purpose of preparing a proposal. This document and any copies produced with or without approval will remain the property of Tourism New Zealand and must be returned to it upon request.

Tourism New Zealand shall be entitled to rely on all statements and representations made by the proposer in response to the RFP or subsequent enquiries or correspondence whether such statements or representations are given in writing or orally.

All information submitted by proposers in their proposals that are regarded as confidential in nature, must be clearly marked ‘Commercial: In Confidence’.

Tourism New Zealand would like to remind proposers that under the provisions of the Official Information Act Tourism New Zealand may be obliged to disclose certain information if a request for information is made pursuant to the Act. Tourism New Zealand will endeavour to refuse requests to release information which is commercially sensitive, but no guarantee is given that refusal to release such information will not be successfully challenged.

All proposers are required to acknowledge in their proposals that they accept the terms and conditions set forth in this Section 11. Proposals which fail to give such acknowledgement may be rejected by Tourism New Zealand.

Appendix 1 A framework of needs and motivations for understanding the long-haul travel market

Introduction

Ask a traveller about their long-haul travel experience (that is, when they’ve travelled more than six hours by air to reach their destination), and they’ll often say this type of travel provides some of their most enjoyable and significant life experiences.

New Zealand’s place in the world means we are a long-haul destination for thousands of people every year. So how can we find out whether we’re providing the experience these travellers are looking for? How can we put New Zealand at the top of their list of long-haul destinations?

First, we need to define just what they’re looking for – and then establish whether we can offer the experience that meets those needs.

That’s what this framework aims to do. It asks questions such as:

- What are travellers looking for in long-haul travel?
- What basic needs does the experience satisfy?
- How does New Zealand meet these needs?
- How can we use this knowledge to position New Zealand as a great vacation destination?

The framework is a useful tool for New Zealand's tourism industry. Produced as part of a project for the Tourism New Zealand, it provides some valuable insights into the 'inner workings' of this unique travelling market.

Seeking discovery

All long-haul travellers describe a sense of **discovery** as a key part of their travel experience – a desire to **discover and expand their world**.

Individual travellers vary widely in how they do this, and choose destinations and experiences that meet their individual needs. Their choice may also be affected by the things they like to do at home:

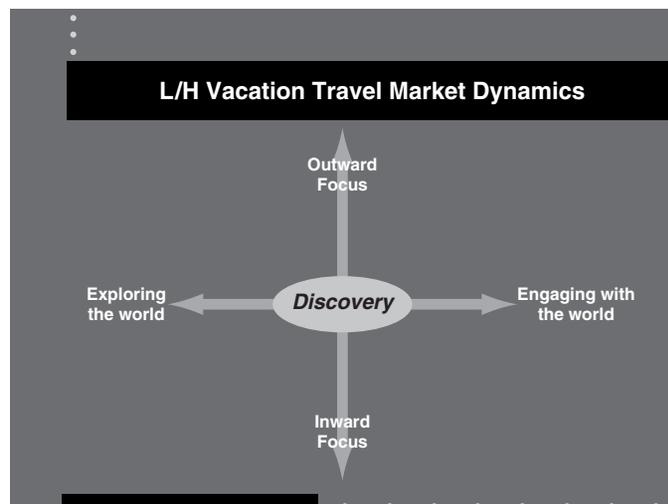
- A weekend 'trail walker' may choose to backpack when they travel.
- An avid reader may travel to book fairs around the world.

However, some underlying dynamics in the market shape all travel preferences. These dynamics provide a framework for understanding the needs in the market overall.

The travel dynamics

Two key emotive forces shape long-haul travellers' decision-making in long-haul travel:

1. 'Exploration' vs 'engagement'
2. An 'outward' vs an 'inward' personal focus.



The **horizontal axis** deals with the person's relationship with the environment. It ranges from seeking to explore the world (for people who

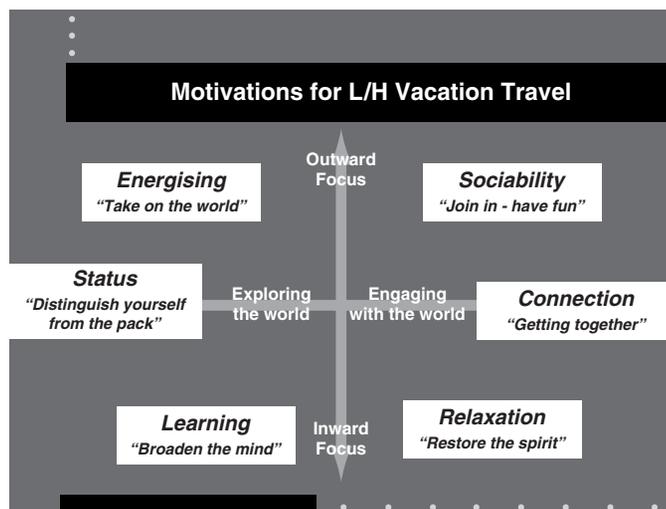
investigate or challenge their world), to seeking to engage their environment (for people who seek connection with people and/or with their natural surroundings).

The **vertical axis** deals with the traveller’s personal focus on their journey.

Inwardly focused people seek a mental or emotional retreat that centres largely on their internal world. Outwardly focused people seek to connect and interact with the outside world, either physically with nature or socially with other people.

Together these two dynamics create a range of distinct needs in the long-haul market.

Travel needs and motivations



Energising – What is it? • • •

‘Energising’ is about the need to experience a feeling of excitement and interaction through physical activity, experiencing oneself as a physical being. A sense of being re-energised, challenged and even exhilarated through physical activity.

It’s the feeling I get, getting to the top of a mountain I’ve just climbed and just standing there. A sense of accomplishment . . . it’s a challenge. Climbing adds to the whole experience . . . a physical rush . . . incredible.

Who are ‘energising’ travellers?

Typical travellers with an energising need:

- are younger (under 40) and more physically fit than the average traveller
- are interested in outdoors activities in daily life, and may be ram-pers/hikers, backpackers

- use a large variety of specialist guides (*Lonely Planet, Rough Guide* etc.) as well as Internet sources such as travel sites
- like to rely on word of mouth where possible. Word-of-mouth information gives them the feeling of being insiders who discover places and experiences that are ‘off the beaten track’
- see themselves as confident, energetic, adventurous and outdoorsy

Wants to get into nature, into the challenge . . . physical exhilaration.

Profile of an ‘energising’ traveller

‘Steven’ is a 27-year-old coast guard, living in New York.

Previous travel: Aruba, Barbados, Europe

Travel to New Zealand: would like to backpack New Zealand with his girlfriend.

Motivation: ‘Like Christopher Columbus discovering the New World . . . Just you, thinking you are the first. Of course there have been other people like there was with Christopher Columbus then, but in your mind, in your own heart it’s just you – and it’s so new and real’.

Personal ideal: ‘Not only accomplishment but it’s a feeling like a new world conquered. Would love to bungee . . . so wild . . . incredible feeling of freedom, excitement’.

Energising – What is the ideal vacation?

Environment

A natural environment that provides the potential for release through a range of physical activities.

A place to be explored and interacted with physically.

Tracks for walking, beaches for swimming, and mountains for climbing.

Activities

Walking, tramping/hiking, climbing, river rafting, kayaking, and bicycling.

Novel activities like such as sailing and bungee jumping – but note these are not for everyone; they may be too extreme and risky for some.

The individual’s physical fitness plays a part in which activities appeal.

Planning and preferred mode of travel

Travel planning can be either very involved, with plenty of research on journey detail, or more spur of the moment and allowing for a sense of freedom and excitement.

Travellers may prefer to travel independently or use a package deal, but generally find tours too restrictive.

Ideal destinations

Countries with distinctive natural environments (e.g. Nepal, South America, Australia, New Zealand) which offer the promise of the ability to interact physically with the environment.

Images that appeal to energising needs

- Images that show vibrant, exhilarating, outdoor images of physical interaction with nature.
- Walking, bicycling, tramping/hiking, kayaking.
- Show one or two people getting into the outdoors.
- Natural images that are exhilarating and invigorating to view (e.g. majestic waterfalls, surf, mountains).
- Overall feeling of communications should be bold refreshing and lively (not life-threatening!).

Avoid images that are too extreme (e.g. bungee jumping) and that have relatively niche appeal. (*Note:* while pictures of 'icon' activities like 'bungee' fit well here they have the potential to alienate travellers with a less extreme approach to satisfying their energising need. Ensure eye-catching pictures of extreme adventure activities are used only in conjunction with other, less extreme activity images.)

Sociability – What is it? • • •

'Sociability' is about participating with others and having fun in a lively, outgoing and sociable environment.

Travellers with this need:

- love to share their travel experiences with others along the way
- enjoy a feeling of camaraderie or togetherness
- typically travel with a companion or group
- choose destinations that provide the potential for meeting others.

She just wants to have fun – not see every ruin in the world – somewhere where there is a lot of people and a lot happening . . . a feeling of excitement, energy . . . something is about to happen.

Who are 'sociability' travellers?

Typical travellers with a sociability need:

- are younger (aged 20 to 30)
- are interested in socialising with their peers
- are not extensively travelled
- use standard sources for travel information (such as travel agent newspaper travel sections)
- see themselves as outgoing, energetic and sociable.

He's not married so he's out to have a good time with people his own age . . . it's all about meeting people.

Profile of a 'sociability' traveller

'Michael' is 22 years old, a law student, and currently living in Los Angeles.

Previous travel: to Europe with family and Australia/New Zealand with a group of friends

Travel to New Zealand: a three-day package, which was a side trip from Australia. Took day tours to see local sights, and went clubbing and pubbing at night.

Motivation: 'I wanted to go on that trip . . . to party . . . some sight seeing . . . but I'm embarrassed to say it, we go out to meet girls. That was what the whole trip was about.'

Personal ideal: 'Somewhere by the beach . . . meeting people . . . the city life . . . where I could party and meet people.'

Sociability – What is the ideal vacation?

Environment

A lively, urban environment that provides the potential for socialising with locals and other travellers (ideally with people from a similar culture and age group).

Activities

Seeing the nightlife (dining out, pubs, clubbing).

Day activities such as visiting a popular beach, recreational shopping, visiting museums, and cafés.

Tours or cruises with other travellers of similar ages or interests.

Planning and preferred mode of travel

A more open-plan, 'free and easy' schedule, or cruises and resorts providing a 'no-planning' alternative that leaves travellers free to socialise.

Ideal destinations

Island resorts such as Greek Islands, Caribbean Islands – anywhere that offers a lively social life (Australia's cities are an excellent fit).

Images that appeal to sociability needs

- Lively images that depict social interaction against an appealing vibrant backdrop. A range of day and night, age-appropriate images (e.g. beaches and shopping during the day, dining out, pubbing or clubbing at night). People interacting in urban as well as rural settings.
- Convey lively, social and fun feelings.

Avoid images that are solitary or too rural.

Connection – What is it? • • •

'Connection' is the need to feel connected to others and at one with the environment. Travel is the opportunity to reconnect with the world – either with people (especially friends and family) or symbolically with nature.

Just somewhere where I feel whole and complete . . . a feeling of belonging, being part of everything . . .

Who are 'connection' travellers?

Typical travellers with the connection need:

- are families, couples (families may prefer short-haul travel, as it is less stressful)
- use standard sources for travel information (such as travel agent newspaper travel sections)
- see themselves as warm, friendly, relaxed, and easygoing.

She just wants to kick-back . . . get back to being a family . . . to really spend time with each other instead of two minutes over breakfast.

Profile of a 'connection' traveller

'Sherry' is a 47-year-old real estate investor, currently living in Los Angeles.

Previous travel: multiple trips to Hawaii, the Caribbean, Spain, with husband and other couples – cruising and shopping.

Travel to New Zealand: intends to backpack with her 14-year-old daughter.

Motivation: 'It's really clean, fresh and healthy . . . you know, just spending time laughing, talking, crying. It's the perfect place to really get in touch with my daughter . . . just having that bond.'

Personal ideal: 'A lot of quiet time walking and hiking together and seeing things . . . really beautiful surroundings.'

Connection – What is the ideal vacation?

Environment

A blend of urban and rural, typically an attractive town with easy access to the countryside (natural and cultural). A good range of things to do nearby.

Activities

Activities that can be enjoyed as a couple or as a family. A mixture of seeing the local nightlife (dining out, theatre) and day activities to enjoy the natural environment. Includes recreational shopping, visiting museums, light physical activities, walking, kayaking, and guided walks.

Planning and preferred mode of travel

Travel plans that allow them to take in their surroundings and enjoy who they are with, without having to rush or 'do' too many things or places.

May choose tours or package deals that allow them a hassle-free trip for themselves and their travel companions.

Ideal destinations

England and (depending on familiarity) other parts of Europe, Australia, and New Zealand.

Images that appeal to connection needs

- Images depicting a small group of people enjoying each other's company against a natural backdrop.
- Images that focus on the relationship between the people and nature. Show light, fun activities that can be enjoyed as a family or couple – walking, bicycling, and kayaking. Show one or two people enjoying the outdoors.
- Warm and friendly, conveying the connection between the people.

Avoid images that are too overtly social or too subdued.

Relaxation – What is it? • • •

'Relaxation' is the need to completely unwind and restore the spirit, taking 'time out' to forget the stresses of life. It's an essentially inward and thoughtful experience.

Travellers with this motivation seek new destinations and activities that will allow them to unwind in an unstressful and tranquil setting.

Nature . . . nothing but you and your surroundings . . . peaceful and relaxed . . . back to yourself again in this beautiful place.

Who are 'relaxation' travellers?

Typical travellers with the connection need:

- are older (aged 40-plus)
- are well travelled
- use standard sources for travel information (such as travel agent newspaper travel sections)
- see themselves as mature, quiet, thoughtful and relaxed.

He's older, not in a rush and he likes to take his time - really relax.

Profile of a 'relaxation' traveller

'Lisa' is a 39-year-old insurance adjuster, currently living in Los Angeles.

Previous travel: France and Germany to visit relatives.

Travel to New Zealand: two weeks to visit some New Zealand acquaintances who invited her to stay.

Motivation: 'They were so friendly . . . it was a once in a lifetime chance . . . told me how beautiful it was and I just wanted to go, how pretty it is and the restful feeling of it. When I came back I thought "Wow - I didn't know there was such a nice place on this planet".'

Personal ideal: 'Somewhere quiet and cruisey . . . subdued and relaxed.'

Relaxation – What is the ideal vacation?

Environment

A quiet but inspiring natural environment that provides real potential for relaxing and restoring the self. The culture should feel relaxed, familiar and friendly.

Activities

Activities that allow the traveller to observe the natural environment in a relaxing and non-stressful way, such as walks, cycling and bus tours to visit natural wonders. The type of activity depends on the traveller's experience, interests and fitness. Some find only the most sedate activities relaxing while others find tramping/hiking or snorkeling perfectly relaxing.

Planning and preferred mode of travel

Predictable travel – simple itineraries, package deals, or tours that really allow them to 'kick back'.

Ideal destinations

More culturally similar locations that promise spectacular natural beauty, such as Ireland, England, Scotland, Australia and New Zealand.

Other European countries (non-English speaking) that promise natural beauty (France, Sweden, etc.).

Images that appeal to relaxation needs

- Images of inspiring natural beauty – vivid and spectacular scenery that seems to invite relaxed reflection.
- One or two people – if any at all.
- A panoramic feeling that conveys a real sense of tranquility. Inspirational, breathtaking and pure feelings.

Avoid images with too many people, urban environments, or natural environments that are forbidding and do not invite or suggest relaxation.

Learning – What is it? • • •

'Learning' is about the need to understand and explore the world in an inquiring and intellectual way. Learning travellers are looking for interesting and unique locations providing a high degree of cultural difference, which they seek to explore and understand fully.

It's that feeling of learning about a new place... you see yourself anew through exploring a new culture... it's a personal journey... personal growth in a way.

Who are 'learning' travellers?

Typical travellers with the learning need:

- are older (30 to 40 plus)
- are independent travellers

- are well travelled, see themselves as intelligent, thoughtful and individualistic.
- are interested in other cultures, reading, watching documentaries etc.
- use a large variety of specialist guides, including Internet sources such as chat groups and travel sites
- are happy to book their own travel directly.

She goes to places other people don't think of because she wants to understand all different people . . . wants to go everywhere.

Profile of a 'learning' traveller

'Megan' is a 32-year-old office worker, currently living in New York.

Previous travel: several trips to Europe and South America.

Travel to New Zealand: plans to visit New Zealand as a backpacker.

Motivation: 'New Zealand is just rugged beauty. The hiking there is supposed to be beautiful . . . something I want to experience for myself . . . finding out what the place and the people are like - experiencing another new culture.'

Personal ideal – 'I guess meeting the people of the land – understanding them . . . seeing the world differently and understanding more about it.'

Learning – What is the ideal vacation?

Environment

A culturally interesting environment that provides the potential for learning about new and different places. Contact with people from the local culture is important – without these travellers can find the experience dry, uninteresting and 'touristy'.

Activities

Taking part in the daily life and learning about the culture as well as the places of cultural and historical significance.

Tours that provide specialist information about the location, increasing the richness of the experience.

Activities that satisfy an interest in local architecture, cultural events such as local or international arts festivals, religious rituals, dancing.

Planning and preferred mode of travel

Detailed travel plans give these travellers a sense of competence and control.

Learning as much as they can about the culture before they go extends the travel experience into their daily life and allows them to become experts on their destination.

They prefer to travel independently, using package deals only to take advantage of a special lower price.

Ideal destinations

Exotic, mysterious destinations (different languages are no barrier for these travellers) that are culturally interesting.

Western Europe is a good starting point, then Asia, Africa, and Eastern Europe for when they gain experience.

Images that appeal to learning needs

Images that show different and interesting cultures as well as interesting and unusual natural features.

- Images should raise curiosity, be unique and compel the viewer to want to investigate.
- Overall feeling of communications should be interesting, authentic (an almost 'documentary' style) and suggest a unique experience (the only place where this happens).

Avoid images that are predictable or too 'commercial' and contrived (e.g. cultural shows obviously put on for tourists).

Status – What is it? • • •

'Status' is the need to distinguish oneself from the pack, to express one's individuality. These travellers seek a sense of sophistication and difference.

They prefer travel experiences that are individual and unique either in their luxuriousness, cultural sophistication, or intellectual significance.

I took an African safari and the hotel was just stunning – absolute luxury. I had heard about it and wanted to go there, it was one of the best hotels in the world . . . that makes me want to go somewhere if it's going to be really special, really unique, a one of a kind.

Who are 'status' travellers?

Typical travellers with a status need:

- are individualistic,
- are well travelled
- are interested in exotic and special destinations that not everyone travels to
- use a large variety of specialist guides or glossy travel magazines in search of unique and/or exclusive destinations
- see themselves as intelligent, discerning, individualistic, self confident and well travelled
- collect countries and experiences as badges of their status.

Been everywhere . . . wants something special something that everyone else hasn't done already.

Profile of a 'status' traveller

'Simon' is 59 years old and is a manager living in New York.

Previous travel: many trips to Europe, South America, Asia as an amateur photographer.

Travel to New Zealand: plans to visit New Zealand as part of a photographic trip to Australia.

Motivation: 'New Zealand specialises in beautiful waterfalls, . . . I photograph beautiful waterfalls . . . [I like to get] an appreciation of the destination, its culture.'

Personal ideal: 'It's a gorgeous place, it's got to be a very off the beaten path kind of place – it's exotic. The fact that a lot of people don't go there, it's remote.'

Status – What is the ideal vacation?

Environment

A place that is unique/exclusive and one of a kind, in:

- the environment – "the only location that has X"
- the accommodation – 'the best of this kind in the world', or
- the activities – 'the only place where you can X'.

Activities

One of a kind, trendy, exclusive, such as African safari, Peruvian mountain climbing, golfing in Scotland, skiing in New Zealand in northern summer.

Planning and preferred mode of travel

These travellers see themselves as more discerning than the average traveller – they either plan their travel themselves or allow themselves the luxury of others planning for them (cruises, tours or package deals).

Ideal destinations

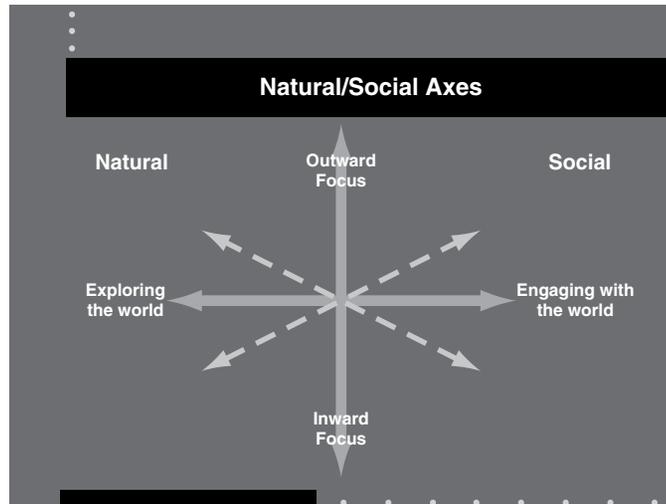
Destinations that set them apart from the crowd. Either new or interesting locations such as Prague and Vietnam, or premium experiences in more traditional destinations, e.g. Paris, Rome.

Images that appeal to learning needs

- One of a kind experiences that are distinctive, unique or especially luxurious.
- Convey a sense of exclusiveness in the tone and execution.
- An air of authenticity, authority, and individuality (premium cues are only appropriate for those who seek the more luxurious side of the status need).
- Avoid images that convey destination as a conventional, everyday travel destination.

How does New Zealand meet these needs?

Two dynamics pull diagonally across the framework: the Natural axis; and the Social axis.

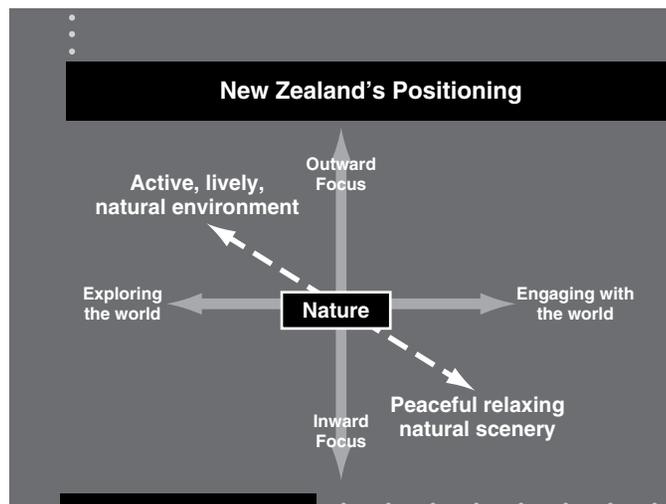


The cultural and social side of travel is covered by the **bottom left quadrant** (dealing with a need to learn and investigate cultures) and the **top right quadrant** (dealing with a need to be in a sociable, outgoing and interactive context).

The natural aspects of travel are covered by the **top left-hand quadrant** (a need to be part of the exciting energising, enjoyment of nature) and the **bottom right quadrant** (a need for a more relaxed, reflective enjoyment of nature).

Where is New Zealand in this? • • •

Potential and actual visitors to New Zealand see New Zealand’s key appeal being its natural environment – putting New Zealand strongly along the Natural rather than the Social axis.



While New Zealand is well positioned to meet needs at both ends of the Natural axis, it is more important to focus on the more aspirational Energising need – focusing on Relaxation reinforces some current perceptions of New Zealand as a relatively quiet and uninteresting destination.

Perceptions of New Zealand by motivation • • •

Energising

New Zealand's distance and rugged natural beauty have strong appeal, and the country can fit the need for new and interesting outdoor destinations. However, some travellers perceive New Zealand as currently too quiet and pastoral.

I would go there because of the nature, just to see what it is like to get lost in the wilderness down there.

Sociability

Overall, New Zealand is not an ideal fit for travellers with sociability needs, as the New Zealand experience is seen as lacking the necessary social liveliness these travellers seek.

Backpackers are a notable exception, as a social interaction through the backpacker network allows young people to meet and socialise with backpackers throughout the country.

You don't really think of New Zealand as having a night life or many people – more quiet and relaxing.

Connection

New Zealand is seen as providing the relaxed, easy-going environment these travellers seek. However, as they enjoy group activities, they may feel there are not enough activities in the cities for a group of friends, a couple or a family.

She's looking for something where the whole family can relax. They would be safe in New Zealand with the children but she wouldn't be sure if the kids would have enough to do. Also it's a long way to take a family and they want to do things as a family.

Relaxation

New Zealand is an ideal fit for these travellers as it is seen as providing a relaxed, scenic natural environment perfect for really kicking back and enjoying nature.

It's a feeling of calm and serenity. He hasn't got a care in the world. Finally time to stop rushing and to smell the roses . . . to kick back and enjoy his surroundings.

Learning

New Zealand is seen as lacking a strong and different indigenous culture. Its dominantly European culture is not sufficiently exotic, mysterious or authentic for the tastes of these more independent and adventurous travellers.

The native culture there is pretty much gone . . . it's all just touristy stuff, so you don't really see much different.

Status

New Zealand's unique and premium aspects can appeal to this need for 'one of a kind' or premium experiences. The exceptional natural environment coupled with factors such as off-season skiing and premium fishing, golfing, and accommodation can appeal to these very discriminating travellers.

I have always wanted to go skiing there in the summer time. I thought it was going to be wild to go skiing in August and July. Just really just to say to people, 'What did you do for the summer?'. I'd say, 'I went skiing.' They'd say, 'Water skiing?' I'd say, 'No, snow skiing'.

Appendix 2 Tourism New Zealand's target market – the interactive traveller

The 100% pure campaign launched by Tourism New Zealand in August 1999 seeks to position New Zealand as a destination that offers experiences best suited to the needs of the interactive traveller.

The interactive traveller

Our ideal visitor is defined as a regular international traveller who:

- consumes a wide range of tourism products and services
- seeks out new experiences that involve engagement and interaction with natural, social and cultural environments
- respects the environment, culture and societal values of others
- is considered a leader by his/her peers
- is not averse to planning and booking holidays directly
- uses technology to enhance their lives
- values authentic products/experiences as opposed to having a 'trend' consciousness
- is health conscious, values connection with others and places high value on authentic products and services
- enjoys outdoor activity, is sociable and seeks learning experiences.

Compared with all travellers, interactive travellers are more likely to:

- spend more time in New Zealand
- spend more per visit

- visit NZ to experience the scenery, physical activities, culture, and wildlife
- book more of their travel while in NZ
- rate their holiday experience in NZ higher
- are more likely to participate in activities
- are more satisfied with the activities they do
- are more likely to use more personal forms of transport (e.g. rental cars) and accommodation (e.g. farm stays, lodges).

Tourism New Zealand has produced a series of fliers to provide trade with an overview of how this target market is defined. These fliers can be viewed at: http://www.tourisminfo.govt.nz/cir_pub/index.cfm?fuseaction=253

Interactive traveller – standard research questions

The following are the standard questions for use in research projects to assess whether or not respondents fit the profile of an Interactive Traveller.

Section 1 • • •

Respondents will be asked if they have travelled* long haul in the previous 12 months for holiday or leisure purposes, or are likely to travel long haul in the next 3 years for holiday or leisure purposes.

Interactive travellers will agree to the first part of this question and be very likely/quite likely to travel in the next three years. An example question, for use in the UK market, follows:

Q1a

Have you travelled to a destination OUTSIDE the UK, Europe, or North Africa for holiday or leisure purposes in the last 12 months?

Q1b

In the next three years, how Likely or Unlikely are you to travel to a destination OUTSIDE the UK, Europe, or North Africa for holiday or leisure purposes?

Would you say it is:

- Very likely
- Quite likely
- Quite unlikely
- Very unlikely
- Can't say

* (in the case of Australia, which is not a long-haul market – respondents who travel overseas)

Important notes

In the case where a respondent has actually travelled (to New Zealand), the first questions about having travelled in the previous 12 months or likelihood over the next 3 years obviously can be omitted.

Obviously 'long haul' will vary according to markets. Suggestions for the

UK, the USA and Japan follow.

UK – OUTSIDE the UK, Europe and North Africa

USA – OUTSIDE the USA, Canada, Mexico or the Caribbean

JAPAN – OUTSIDE Japan, China, Hong Kong, South Korea, Macau, Philippines, or Taiwan

Section 2 • • •

Respondents will be asked to select **one** of the following statements in response to the questions 1–5 inclusive.

- (a) Strongly agree
- (b) Agree
- (c) Neither agree nor disagree
- (d) Disagree
- (e) Strongly disagree

Questions

- (1) I prefer to holiday where I can see nature or be in a natural setting
- (2) I'd like to holiday where I can experience the local culture
- (3) I look for new experiences every day
- (4) I consider myself a leader more than a follower
- (5) I enjoy holidays where everything is organised for you

Interactive travellers should agree or strongly agree with questions 1–4 and disagree or strongly disagree with question 5 in this section.

A Show Card example follows to illustrate how this could be used in face-to-face interviews.

(Show card X)

I am now going to read out some statements, please tell me whether you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree with the following:

Insert Statement – xxxxxxxxxxxxxxxxxxxxxxx

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

Can't say