

Doreen Kupke

Destination Branding: An Analysis of the Swedish Destination Image Representation and the Perception on the German Market

Master's Thesis

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Doreen Kupke

Master Thesis in the Field of International Tourism Management

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List of Abbreviations

UNWTO	United Nations World Tourism Organization
IBIS	Inkommande Besökare I Sverige (Incoming Visitors to Sweden)
DINK	Double Income No Kids
WHOP	Wealthy Healthy Older People
e.g.	for example
etc.	et cetera
DI	Destination Image
SMTE	Small and Medium Tourism Enterprises
DMO	Destination Marketing Organizations
BAT	British American Tobacco

1. Introduction

1.1 Background and Purpose of the Topic

Destinations are one of the tourism industries biggest brands. Nowadays, travelers are overwhelmed with places, which fit in their holiday scheme. The tourism market is crowded by destinations and the outcome is the substitutability of places. (Pike, 2005) Destination branding is a way to differentiate a destination from its existing competitors. Branding a country is a complex and multilevel business. One of the core aspects in destination branding is to identify and differentiate a destination through to a positive destination image. The destination image is a crucial part in the travelers' decision making process and verifiable influence the tourist behavior. Therefore the destination image has become one of the major concepts in destination marketing. Special focus is given to the destination image theory, which is a major aspect in destination branding. (Echtner & Ritchie, 2003; Qu et al., 2011; Wang & Pizam, 2011)

Just as product brands, destination brands are living entities. They have to be managed continuously and changed over time, to ensure a fit to environmental changes. (Wang & Pizam, 2011) Sweden has therefore developed a national branding and sales strategy for the tourism industry to implement until 2020 and fully launched in 2013. (Gaßmann, 2013) A part of this strategy is the creation of special themes to present a holistic Sweden image and destination brand. (Communication Guide, 2013) Among others, this strategy will be used to compare the presented and advertised Sweden image with the image perception on the German source market, to analyze compliance or incongruity. Germany is an interesting and important source market for the Swedish tourism industry. According to the research of the UNWTO, Germany is one of the biggest spenders in the tourism industry in 2011 (UNWTO, 2012). Based to the results from IBIS, the Swedish Border Survey about foreign visitors in Sweden, Germany hold the fourth place, after Norway, Finland and Denmark considering the amount of travelers to the country in 2011, with 1.796.016 visitors (IBIS, 2012). Taking this into account, presenting a positive, fitting and attractive country image has to be one of Sweden's main aims.

On these grounds it is important to ask, if the implemented image meets the expectations of German travelers to Sweden. What is Sweden from a German point of view? How do Germans perceive the image of Sweden?

Therefore three Hypotheses have been constructed.

Hypothesis 1: The Swedish Image is coined by outmoded Stereotypes

Many studies, (Image of the North, 2009; Image Study Germany, 2011) show that the German association with the country is based on stereotypes like Elks, Nature or Lakes. The author wants to find out if this image of Sweden is still consisting.

Hypothesis 2: The Image Perception of Sweden is hard to control and affect

Country images are hard to affect and often influenced by cultural transmitted information, e.g. from family and friends or school education. Only little information, which are admitted by the tourists, are under the direct or indirect surveillance of destination marketing organizations. (Hennig, 1998 cited in Kliem, 2003; Wang & Pizam, 2011)

Hypothesis 3: Sweden has the Image Potential to become an attractive Travel Destination for young People

By now, the target groups for Germany are according to Visit Sweden (2013) mainly described as Whops (Wealthy Healthy Older People) and Active Families. Younger people or students are not included as direct target groups. (Communication Guide, 2013) But, the study *Image of the North* (2009) has analyzed Sweden as a stylish, modern and likeable country from a young German point of view (the interviewees have been young German students). The author wants to find out if the current image presentation of Sweden is interesting and appealing for young Germans. Furthermore it should be analyzed if there is a tendency and willingness of young Germans to travel to Sweden.

The overall aim is to analyze the congruity of the presented Sweden Image with the perceived destination image in Germany. The author wants to find out, if the destination image fits to the overall imagination of Sweden from a German travelers point of view.

1.2 Structure

The first chapter gives an introduction into the chosen topic and the evaluated hypothesis. The aim of the thesis is lined out and the methodology for the processing is described. Chapter 2 deals with the concept of destination branding, a definition of the term is given in chapter 2.1. The phases of brand building, challenges in destination branding and critical factors of success and benefits of destination brands are presented in the chapters 2.2-2.5.

Chapter 3 addresses the second big theoretical part, the destination image. A definition is given in chapter 3.1 followed by the characterizing and nature of the destination image in chapter 3.2. The respective chapters deal with the components of the destination image as well as the formation and the effects it can have on certain tourism selection processes. The connection of destination branding and the destination image is done in chapter 3.6, connecting the two big theoretical parts and describe the coherences of the theories.

The chapter *Current Situation of the Swedish Tourism Industry* presents the chosen country Sweden and its actual situation on the tourism market. Inside the subchapters is the traveler profile drawn, attractions and touristic offers described and the priority source markets as well as target groups depicted. Thereby a special focus is given on the German source market. Within chapter 4.4, the Swedish nation branding strategy, especially the development of a holistic nation brand and the current image presentation of the destination is indicated. The implementation of the branding strategy within the certain regions of Sweden is outlined in chapter 4.4.3 and described on real cases.

Chapter 5 is the main part of the thesis and considers the executed survey *The Image of Sweden*. The methodology, conceptions and circumstances of the survey are pointed out in chapter 5.1.1. Chapter 5.1.2 characterizes the spot check of the survey to give more exact information about the survey respondents. The biggest and most important part of the survey is presented in chapter

5.2, which deals with the survey outcomes of the image perception of Sweden. Within this chapter the survey outcomes are presented, analyzed and via graphical illustrations, tables etc. represented.

Chapter 6 evaluates the developed hypotheses regarding their confirmation or disconfirmation. Needs for improvement are given at the end of each hypothesis chapter, to optimize the Swedish branding strategy within the German market.

The last chapter, chapter 7, sums up the findings of the work, gives a future outlook of this field of work and a critical view at the chosen topic.

1.3 Methodology

Firstly, as a theoretical framework, the destination branding and destination image theory will be described. The author will analyze relevant models, concepts and the purpose of these theories on basis of a literature analysis.

Secondly, a short illustration of the current situation of the Swedish tourism industry and its present destination image presentation will be done via the usage of different studies, data samples, internet based research and tourism brochures.

Thirdly, the perceived country image of Sweden will be analyzed via an own data collection. Primary data is gained via a quantitative and qualitative online questionnaire, published on various internet portals and social media pages. To verify the outcomes, a literature analysis will be done and different studies, e.g. the *Image of the North* from the University of Wurzburg (2009) will be incorporated. Furthermore, secondary data samples and professional articles will be used to illustrate a more detailed picture of the German perception of Sweden as a destination. The outcomes are the base for the evaluation of the developed hypothesis.

Lastly, individual needs for improvement and a future outlook will be given to optimize and ensure a strong and congruent Swedish country brand on the German market.

2. The Concept of Destination Branding

2.1 Definition Destination Branding

For a better understanding of the topic, the terms destination and branding need to be defined. Destinations are *"geographic locations with resources, attractions, infrastructure, superstructure and facilities that attract people to visit and stay temporarily for diverse reasons"* (Pike, 2004, cited in Wang & Pizam, 2011, p. 115). Destinations are complex buildings consist of various pieces and including different stakeholder, which makes them different to convenient products. (Wang & Pizam, 2011)

Branding is considered as one of the major tools to market a product, by the definition of the American Marketing Association (n.d.) a brand is a *"name, term, sign, symbol, or design, or a combination of them intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition"* (cited in Kotler & Gertner, 2002, p. 249). Making clear, that differentiation to competitors is in the focus of branding.

Combining the two terms, Morrison and Anderson (2002) defining destination branding as *"a way to communicate a destination's unique identity by differentiating a destination from its competitors"* (cited in Qu, et al., 2011, p. 466). This definition outlines the importance of the actions that have to be done, like the right communication or advertisement, to establish a unique destination brand.

The most detailed definition is given by Ritchie and Crouch (2003) who define a destination brand as *"a name, symbol, logo, trademark or other graphic that both identifies and differentiates the destination; furthermore, it conveys the promise of a memorable travel experience that is uniquely associated with the destination. It also serves to consolidate and reinforce the post-travel recollection of pleasurable memories of the destination experience"* (Ritchie & Crouch, 2003, p. 196). Taking this into account, the destination brand is far more as just a logo, name and symbol; it also includes historical and cultural elements like heritage, language, myths and legends. It is a memorable experience for the traveler. The author will take the definition from Ritchie and Crouch (2003) as base for the analysis of destination branding, because it is the most complex and holistic one. Destination brands shall give the tourist a security and assur-