Increasing state market share through a regional positioning

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Abstract

State tourism officials need to know more about the nature of in-state and out-of-state visitor characteristics and how actual and potential visitors perceive local destinations. The main objective of this study was to understand Virginia's image as a travel destination versus competitive states in the Mid-Atlantic region of the USA. The regional competitiveness of Virginia as a tourism destination was evaluated by creating a "perceptual map" which reveals the similarities and differences in how 10 states were rated on the 48 destination attributes included in the survey. Results showed that Virginia stands out in the quality of its natural and historical landscape; features shared by many of the surrounding competitive states. Virginia competes with Pennsylvania, North Carolina, West Virginia on natural features and competes with Pennsylvania, Maryland, South Carolina, and Georgia on historic and cultural heritage. Virginia's amenities are well known, but lack emotional impact. Possible marketing strategies would be to give Virginia a stronger emotional image, while building on its strong reputation for quality natural and cultural attractions. It is also important that destination promotional activities focus on differentiating features of places in a regional context so that complementary tourism products within the region can also be developed. © 1999 Elsevier Science Ltd. All rights reserved.

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1. Introduction

One of the main objectives of destination promotion and competitiveness is to create a new image or reinforce an existing positive image of a place in the minds of travelers. Because of the organic nature of image, some places may need to augment supply resources to match demand and meet traveler expectations, and thus, create an enhanced image of the existing destination resources. Promoting places has never been an easy task for state tourism offices and public agencies. Several destination marketing organizations (DMOs), including convention and visitor bureaus, national and state tourism offices, and local and regional organizations, are all involved in marketing their respective places. Tourism as an experience takes place in destinations and tourists travel to destinations to see attractions, to participate in leisure activities, and to experience new cultures. Places, whether it is a city, state, country or region within a given country, may have the desire and marketing goal to become a recognized destination, remain competitive, and increase visitation market share.

Several tourism entities throughout the world have been conducting or funding on a regular basis travel projects that are designed to provide baseline information about travelers and to develop appropriate marketing strategies and management actions. Visitor profile studies, including market assessment of, and demand for tourism destinations are most commonly conducted forms of travel studies, followed by tourism impact and conversion studies. Image and perception studies are sporadic in nature and are usually conducted once every three or five years to evaluate changes in the perception of travelers about destinations. The reason for this is that there is a general belief that images and perceptions of places may not change substantially in the short-run, and changing an existing image or creating a new one takes time. In case of major events such as Olympic games or natural disasters or wars, images of places will easily be reformed and changed quickly. The longitudinal treatments of image and perception studies

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are also reported (Mihalik & Simonetta, 1999) for monitoring purposes over time (Gartner & Hunt, 1987; Ritchie, 1984; Ritchie & Aitken, 1984; Ritchie & Lyons, 1987).

To become a recognized destination presents a difficult marketing challenge. To maintain a positive image in the minds of visitors may be even more difficult since alternative and competing destinations are always pushing the limits of market competition to maintain or capture a significant portion of the visitor market.

Indeed, state tourism officials need to know more about the nature of in-state and out-of-state visitor characteristics and how actual and potential visitors perceive local destinations. This type of information is primarily utilized in positioning or repositioning a given place in the tourism market place (Crompton, Fakeye & Lue, 1992; Gartner, 1989; Milman & Pizam, 1995). In addition, such information allows destination marketers and managers to better position themselves so that increased demand for visitation may be generated to their respective destinations.

Several studies examining images and perceptions of places as tourism destinations have been conducted (Gartner, 1993; Dann, 1996). Most, however, have studied one place at a time or a few at best to assess image or perception (Ahmed, 1994; Crompton, 1979; Gartner & Hunt, 1987; Fakeye & Crompton, 1991; Bignon, Hammitt & Norman, 1998; Illiewich, 1998). Some even used travel intermediaries as a proxy for visitors in order to shed light on the way potential travelers may perceive a given destination (Roehl, 1990; Gartner & Bachri, 1994; Dimanche & Moody, 1998). In addition, there have been a few studies of image that have focused on image changes of product offerings at different points in time (Gartner & Hunt, 1989) and images of different tourism resources at one point in time in a given place (Gartner & Shen, 1992). Recently, researchers also have focused on meaning and measurement of destination image (Echtner & Ritchie, 1991, 1993), the image formation process (Baloglu & Brinberg, 1997), regional images (Baloglu, 1996), and sub-regional images within a given destination (Wang, 1998).

Although previous image studies have made notable contributions to the body of literature in the area of tourism management, there has been limited research examining competitive market positioning in a regional context (Pearce, 1997). One of the few studies conducted in a regional context was reported by Ashworth (1990) who examined several selected Mediterranean countries, including Cyprus, Greece, Egypt, Tunisia, Turkey, Malta and Spain. The study focused on common and differentiating features of destinations and how these countries project themselves as destinations using different image agents ranging from a travel agent to destination and resort brochures. Ashworth (1990) points out that the correspondence between the projected and received place image and the product being developed and the consumption of that product is critical. The projected image based on similar features may show variations from place to place, and the extent to which it is received may also show variations (Baloglu, 1996; Ashworth & Voogd, 1988,1990). Therefore, it is of great importance to destination promoters to asses their relative regional positioning in the minds of potential travelers.

The primary objective of this study was to understand Virginia's image as a travel destination versus competitive states to determine the following: (1) Virginia's relative strengths and weaknesses, (2) unique and differentiating characteristics of Virginia, and (3) areas of opportunity which would enable Virginia to win a share from competitive areas.

2. Methodology

This study was conducted in two phases. The first phase included a multicard sent out to 80,000 nationally representative National Family Opinion (NFO) households selected to conform to the latest available US census data for nine geographic divisions by market size, age of NFO member, annual household income, and household size. The survey asked respondents to list separately all pleasure and business trips taken into each of 9 Eastern and South Atlantic states and Washington, DC, during 1992. The second phase was a follow-up telephone survey conducted among an ending sample of 1318 households selected from those who responded to the mail omnibus.

The survey sample consisted of two destination strata (Virginia travelers and competitive state travelers; defined as Maryland, Washington, DC, Pennsylvania, New York, North Carolina, South Carolina, Georgia, Florida, and West Virginia) and five origin strata. The five origin strata were defined according to travel distance from Virginia. The origins and destinations were used to determine five "zones" that were used to classify respondents. It is important to note that these are travelers who specifically mentioned taking a pleasure trip to Virginia or the "competitive states", thus, being pre-disposed to this region.

Data were weighted prior to analysis to bring each origin–destination stratum back to its correct proportion. Weights were assigned based on the percentage of a nationally representative sample, within each travel zone, and drawn from the mail omnibus who had taken a pleasure trip to Virginia and competitive states between September 1, 1991 and August 31, 1992. Their opinions may not reflect a national base of travelers who could also choose to take a pleasure vacation outside of the Eastern and South Atlantic states.

The first part of the data analysis involved a general evaluation and descriptive summary of the data. The last

part of the analysis was to generate a "perceptual map" depicting Virginia's competitive image in relation to competing states and the District of Columbia. The analysis was based on how much each state rated across the 48 image attributes included in the interview. In addition, the study examined Virginia's rating on each attribute in order to grasp the market potential of Virginia.

2.1. Implicit importance of factors and state images

To determine which factors were important in the selection of a pleasure trip destination, the study used a method that determined "implicit importance" of factors was chosen rather than asking respondents directly what was important ("explicit importance method"). This method involved asking respondents to identify which state, or states were best at each of 48 factors read from a list.

The logic of determining factor importance entailed correlating institutions rated best at specific attributes with the respondent's "preferred or top rated" state as a place to take a vacation. This correlation identifies the relative order of influence which the attributes have on respondents' choice of states for vacation trips. For a factor to be truly important to the respondent, it would be expected that it would be a factor held by a "top-rated state" and not be a factor at which a "lower-rated state" was best.

There were two major reasons for using this "implicit importance" method of inferring importance of attributes. First, this method screens out a respondent's inclination to state "conventional wisdom" responses and replaces it with a method that more accurately reveals what motivates or influences the respondent's decisions. Since the method replicates a respondent's framework for decision making, i.e., comparing several states the respondent would likely to consider for a vacation, the factors are evaluated in an exercise similar to an actual decision rather than a hypothetical one.

Second, this method gathers information on the images of states and the relative positioning of a large number of states without having to go through the list of factors for each state. This permits a longer list of factors to be evaluated, thus gaining greater depth and subtlety to the understanding of the decision factors. The end result of this method is the evaluation of 48 factors for importance and the image evaluation of 10 states. However, this approach of image delineation may be criticized on the ground that since image factors are not technically rated on a scale or respondents were not directly asked what was important (explicit importance of factors), the availability of statistical tools may be limited to spatial presentation of data-based frequency counts (implicit importance of factors). Nevertheless, the resulting data appears consistent with reality and internally consistent.

3. Results

3.1. Demographic and trip characteristics of respondents

The descriptive analysis of respondent demographic traits discovered that the average age of respondent was 51 yr, but the largest age group in the sample was the 35–50 yr group (36 per cent). Male respondents constitute about 70 per cent of the study sample while over 70 per cent were married. The average household size was 2.6, but nearly one-fourth of the household had more than three members and 41 per cent had household income greater than $50,000. In respect to respondents' life stage, 40.2 per cent were identified as parents, whereas singles accounted for the smallest sample size (12.8 per cent) (Table 1).

To further delineate the current market position shared by Virginia, the study first profiled those who have the greatest potential to visit Virginia. As a result, the trip characteristics of five groups of respondents were analyzed in the study: the first group ($n = 228$) consisted of individuals who selected Virginia as the most preferred state for visiting; the second group ($n = 209$) regarded Virginia as a primary destination; the third group ($n = 639$) responded that Virginia was one of the states

Table 1
Demographic characteristics of respondents

Demographics	N (1318)	Frequency (%)
Age (Mean = 50.9)		
Under 35 yr	205	15.6
35–50 yr	474	36.2
51–64 yr	335	25.2
65 and over	298	22.7
Marital status		
Now married	930	70.5
Never married	150	11.4
Divorced, widowed, separated	239	18.1
Gender		
Male	406	30.8
Female	912	69.2
Actual household size (Mean = 2.6)		
One person	217	16.5
Two persons	582	44.1
Three persons	214	16.3
Four and over	305	23.1
Household income		
Under $22,500	181	13.7
$22,500–$34,999	291	22.1
$35,000–$49,999	303	23.0
$50,000–$99,999	442	33.5
$100,000 and over	102	7.8
Life stage		
Singles	169	12.8
Parents	530	40.2
Couples	337	25.5
Retired	283	21.5

Table 2
Trip characteristics of travelers

Trip characteristics	VA most preferred (*n* = 228)	VA primary destination (*n* = 209)	VA selected (*n* = 639)	VA forced (*n* = 666)	Visit VA in past year (*n* = 881)
Length of trip					
Short weekend trip	24.5	31.2	19.2	16.7	22.6
Short weekday trip	21.4	11.1	20.5	18.1	27.2
Three or more days	54.1	57.7	60.3	65.2	50.1
Size of travel party					
One person	9.8	13.5	8.9	8.9	9.7
Two persons	41.5	43.2	45.6	43.2	48.2
Three persons	16.4	11.6	13.6	10.5	12.1
Four persons	32.3	31.7	31.9	37.4	30.0
Description of trip					
Travel from location to location	16.5	19.2	30.7	24.6	34.7
Stay mostly in one location	28.7	31.9	28.0	36.2	25.5
One location but visit other locations	44.8	48.9	41.3	39.2	39.8
Season					
Fall	13.4	16.1	18.4	24.0	18.3
Winter	7.3	6.5	10.4	12.1	9.0
Spring	25.7	30.2	22.9	23.8	22.2
Summer	53.7	53.7	48.2	40.0	50.6
Types of destination					
Homes of family/friend	35.8	35.5	24.7	29.6	35.8
Theme parks	8.4	5.4	11.5	12.4	4.8
Beach/resort	14.4	16.1	16.9	30.2	17.1
Outdoors	19.6	23.0	16.2	13.6	18.9
City	21.9	21.4	20.6	14.2	23.3

selected for a pleasure trip; the fourth group (*n* = 666) consisted of those who did not select Virginia as one of their vacation states and were asked to answer their trip preferences to Virginia; the last group (*n* = 881) was the respondents visiting Virginia during the last 12 months.

In Table 2 the frequency analysis showed that all groups have a similarity of four out of five trip characteristics: length of trip, size of travel party, description of trip, and season of travel. These respondents tended to travel with a companion for a longer vacation trip (three or more days) visiting one major location and other secondary locations during summer months. As for the types of destinations visited, the five groups of respondents seemed to have different preferences. Home of family appears to be the most popular destination among four groups of respondents. Most individuals who did not select Virginia as a vacation state expressed that beach and resort (30.2 per cent) and homes of family (29.6 per cent) would be their travel destination if they were to visit Virginia.

The weighted geographic distribution of respondents (sampling was stratified by geographic origin) shows that only 3 per cent live in Virginia; over 37 per cent live within a one-day drive of Virginia. Almost 90 per cent of respondents indicated that they had visited Virginia at least once sometime in the past. Over 61 per cent in-

dicated that they were somewhat or very likely to visit Virginia on a pleasure trip in the next three years.

3.2. Importance of attributes

One way to examine Virginia as a destination state among pleasure travelers is to evaluate Virginia's performance on the 48 destination attributes, relative to the performance of the top-rated state. Specifically, how often the top-rated state was rated "Best" on these attributes indicates the attribute importance as a decision factor. Activities which prove to be important for pleasure trips include kids activities, theme parks, shopping, restaurants, golf/tennis, sightseeing, and spectator sports. However, Virginia did not perform as highly relative to these attributes, when compared to the rated state, with sightseeing receiving the highest rating of 26 per cent, followed by theme parks (21 per cent) (Table 3).

Attributes which Virginia was rated "Best" include Civil War sites, historical buildings, and hiking/backpacking. These attributes were not rated as important for the top-rated state. The places considered important among pleasure travelers include beaches and resorts, where the top-rated state was rated best at least 50 per cent of the time. Virginia was rated best on beaches and resorts by less than 20 per cent.

Table 3
Implicit importance of attributes

Attribute	Top-rated state (%) (n = 1270)	VA best (total %) (n = 1306)
Activities		
Sightseeing	41.1	26.3
Shopping	46.8	13.8
Restaurants	44.8	14.3
Golf/tennis	41.3	13.0
Snow skiing	23.4	25.9
Hiking/backpacking	30.5	37.8
Canoeing/rafting	30.3	28.3
Bicycling	39.2	23.8
Spectator sports	40.3	7.4
Cultural events	31.7	24.4
Theme parks	48.8	21.8
Festivals	38.3	26.8
Kids activities	51.9	13.2
Horse racing	28.1	23.1
Hunting/fishing	30.3	25.7
Civil war sites	23.0	69.0
Historic buildings	27.0	48.7
Places		
Beaches	52.6	19.4
Mountains	29.6	40.8
Cities	38.3	17.0
Resorts	52.2	15.5
State/national parks	36.6	38.1
Towns/villages	26.9	50.0
Natural features	35.1	37.7
Countryside	31.2	48.2
Arch/Eng. wonders	28.3	24.5
Feelings		
Rest/relaxation	49.0	21.8
Escape pressure	47.6	16.7
Exciting travel	44.2	19.3
Family friends	51.3	17.7
New things	31.4	20.1
Romantic setting	42.5	32.4
Familiar place	57.3	16.0
Indulge self/family	55.4	13.2
Friendly people	43.6	23.9
Fun and enjoyment	61.3	10.7
Rediscover self	45.0	22.4
General		
Varity see/do	55.4	15.8
Attraction use together	51.9	17.1
Good value	48.2	18.9
1st class accommodations/facilities	47.4	16.3
Traveler information	46.7	25.1
Convenient/easy	42.3	21.6
High available service	47.1	21.8
Clean/well maintained	46.5	32.3
Ease getting around	50.3	19.4
Good weather	51.7	14.5
Well marked roads/attractions	52.3	24.3

The top-rated state performed "best" overall on feeling attributes, where more than half rated the state best on fun and enjoyment (61 per cent), familiar places (57 per cent), indulge self/family (55 per cent), and visiting family

and friends (51 per cent). These ratings were not evident for Virginia, with romantic setting (32 per cent) being the highest, and less than 25 per cent rating Virginia best on the remaining "feeling attributes" (Table 3). Virginia performed well on clean/well maintained (32 per cent), traveler information (25 per cent), and well-marked roads and attractions (24 per cent).

3.3. Virginia's strengths and weaknesses

A particularly useful way to examine Virginia's strengths and weaknesses is in the form of importance–performance grids. Each attribute is plotted in a two-dimensional grid with importance of the attribute (the extent travelers associate the attribute with their most preferred state) plotted on the "Y" axis and the performance of the attribute (how much that attribute is associated with Virginia) on the "X" axis. Attributes that plot in the upper right quadrant are important qualities that represent Virginia's strengths. Attributes in the upper left represent important qualities that on which Virginia may be weak. Attributes in the lower left are weak, but unimportant attributes. Attributes in the lower right are Virginia strengths to which travelers attach less importance.

Fig. 1 provides a summary of the distribution of destination attributes in each quadrant. The summary of the importance–performance analysis reveals that most of Virginia's strengths are seen as relatively unimportant and most of the important attributes are not perceived as Virginia's strengths. Fortunately, Virginia's perceived strengths are its natural and cultural heritage. It would appear that Virginia's basic product is sound and well known. On the other hand, Virginia's important weaknesses are mostly experiential qualities (fun and enjoyment, indulging self and family, and variety). Many of these perceptions may be improved through effective advertising.

3.4. Relative competitive position

The regional competitiveness of Virginia as a tourism destination was evaluated by creating a "perceptual map" which reveals the similarities and differences in how 10 states were rated on the 48 destination attributes included in the survey. The perceptual map (Fig. 2) clearly shows that Florida is perceived as having the most unique or distinctive travel image of the states included in the study. New York and Washington, DC also appear to have distinct images from the other sates. On the other hand, Virginia is embedded in a cluster with all other states (Pennsylvania, Maryland, Georgia, North Carolina, South Carolina and West Virginia).

The attribute positions do reveal that these mid to south Atlantic states are most closely associated with attributes that describe scenery and countryside (history,
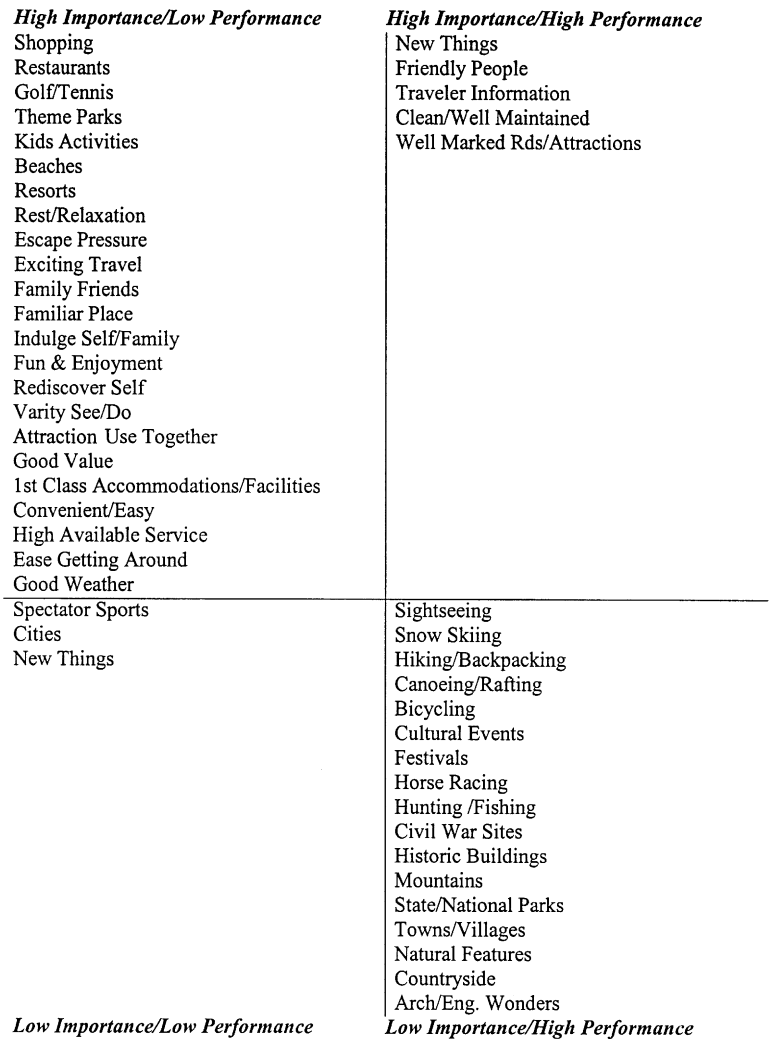
High Importance/Low Performance	*High Importance/High Performance*
Shopping	New Things
Restaurants	Friendly People
Golf/Tennis	Traveler Information
Theme Parks	Clean/Well Maintained
Kids Activities	Well Marked Rds/Attractions
Beaches	
Resorts	
Rest/Relaxation	
Escape Pressure	
Exciting Travel	
Family Friends	
Familiar Place	
Indulge Self/Family	
Fun & Enjoyment	
Rediscover Self	
Varity See/Do	
Attraction Use Together	
Good Value	
1st Class Accommodations/Facilities	
Convenient/Easy	
High Available Service	
Ease Getting Around	
Good Weather	
Spectator Sports	Sightseeing
Cities	Snow Skiing
New Things	Hiking/Backpacking
	Canoeing/Rafting
	Bicycling
	Cultural Events
	Festivals
	Horse Racing
	Hunting /Fishing
	Civil War Sites
	Historic Buildings
	Mountains
	State/National Parks
	Towns/Villages
	Natural Features
	Countryside
	Arch/Eng. Wonders
Low Importance/Low Performance	*Low Importance/High Performance*

Fig. 1. Importance versus performance attributes on Virginia travel market.

mountains, small towns and villages) and least associated with the "fun and sun" attributes attributed to Florida and the "urban/culture" amenities ascribed to Washington, DC, and New York. What appears to separate the Virginia and Pennsylvania cluster from the states in the group is that Virginia and Pennsylvania are more closely associated with urban and cultural amenities than the Carolinas and West Virginia. The Carolinas, Georgia, Maryland and West Virginia are more closely associated with escape, relaxation and renewal.

4. Conclusion and implications

The challenge of destination marketing is that it is made up of many suppliers and service providers. Marketing a tourism region involves complex and coordinated action among the central attractions (both public and private) that draw tourists to a region, the transportation network to connect visitors to a variety of attractions, the hospitality services to fill basic needs while away from home, and information to help tourists meet needs and find their way in a new environment. Successful tourism marketing requires all the components to work together, but it is most easily built from a strong base of varied, authentic, and compelling attractions.

The study reveals that Virginia stands out in the quality of its natural and historical landscape; features shared by many of the surrounding competitive states. Virginia competes with Pennsylvania, North Carolina, West Virginia on natural features and competes with Pennsylvania, Maryland, South Carolina, and Georgia on historic and cultural heritage. Virginia's amenities are well known, but lack emotional impact. Virginia is not seen as an exciting, resort-oriented destination for indulging self and family. Nor does it have the reputation as an opportunity to escape and renew. Virginia gets mixed reviews on variety. On the one hand there is a lot to see, but on
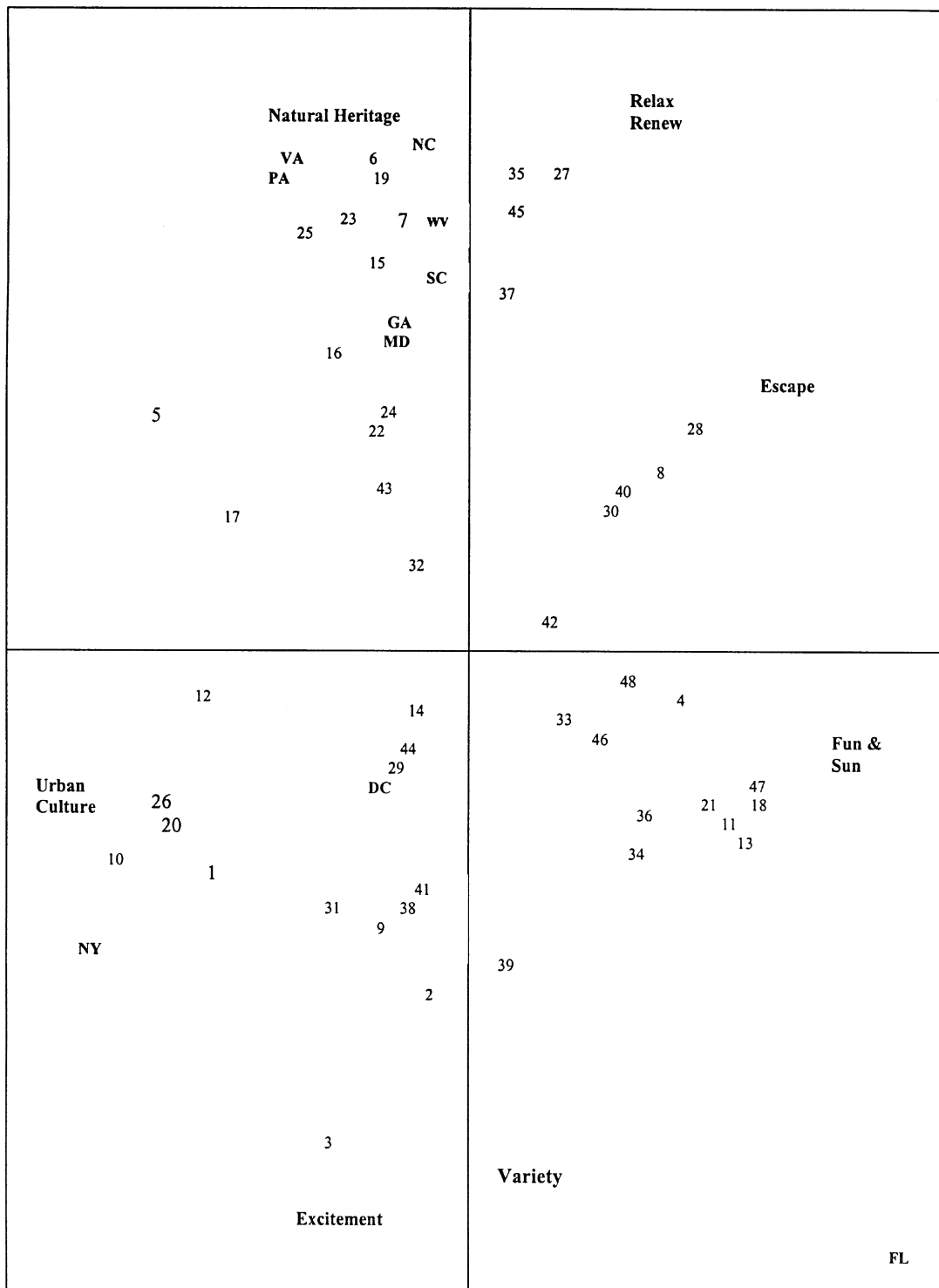
Fig. 2. Regional competitiveness based on 48 destination attributes.

Attribute legend

1. Sightseeing, 2. shopping, 3. restaurants, 4. golf/tennis, 5. snow skiing, 6. hiking/backpacking, 7. canoeing/rafting, 8. bicycling, 9. spectator sports, 10. cultural events, 11. theme parks, 12. festivals, 13. kids activities, 14. horse racing, 15. hunting/fishing, 16. civil war sites, 17. historic buildings, 18. beaches, 19. mountains, 20. cities, 21. resorts, 22. state/national parks, 23. towns/villages, 24. natural features, 25. countryside, 26. arch/eng. wonders, 27. rest/relaxation, 28. escape pressure, 29. exciting travel, 30. family friends, 31. new things, 32. romantic setting, 33. famil- iar place, 34. indulge, self/family, 35. friendly people, 36. fun and enjoyment, 37. rediscover self, 38. varity see/do, 39. attraction use together, 40. good value, 41. 1st class accomodations/facilities, 42. traveler information, 43. convenient/easy, 44. high available service, 45. clean/well maintained, 46. ease getting around, 47. good weather, 48. well marked roads/attractions.

State legend

NY = New York, PA = Pennsylvania, MD = Maryland, VA = Virginia, WV = West Virginia, NC = North Carolina, SC = South Carolina, GA = Georgia, FL = Florida, DC = Washington, DC.

the other hand not much exciting to do. Virginia may lack Florida sunshine, but it is blessed with natural resources and historical heritage, and has a favorable, romantic image and reputation as a clean, attractive state with high quality services and well-maintained facilities. Possible marketing strategies would be to give Virginia a stronger emotional image, while building on its good reputation for quality natural and cultural attractions. One direction might be to emphasize what there is to do along with what there is to see. It is also important that destination promotional activities focus on differentiating features of places in a regional context so that complementary tourism products within the region can also be developed. Such an effort may necessitate the use of cross-marketing of tourism products in a given destination and establishment of management and marketing alliances that would encourage regional destination marketing.

Acknowledgements

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