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North Atlantic island destinations in tourists' minds

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Abstract

Purpose – *This study seeks to investigate the image that tourists visiting Iceland in the summer months have of Iceland as a tourist destination, and whether the positioning of Iceland, the Faroe Islands, and Greenland together as one area in tourist markets is possible or feasible.*

Design/methodology/approach – *The paper presents the results of two surveys. The first survey (unstructured) measures the holistic image of Iceland with a qualitative methodology. The second survey (structured) measures the attribute image of Iceland in comparison with five other countries – i.e. Norway, Scotland, Greenland, Finland and the Faroe Islands – with a perceptual mapping technique.*

Findings – *Results from the unstructured survey indicate that tourists have the strongest holistic image of Iceland as a scenic nature destination. Results from the structured survey indicate that tourists consider Iceland to be a safe place to visit, an opportunity for adventure, a friendly and hospitable destination, and a country of scenic and natural beauty. According to the results, Iceland, the Faroe Islands and Greenland seem to have a different image in tourists' minds.*

Research limitations/implications – *The surveys only report the perception of tourists visiting Iceland.*

Practical implications – *It is hoped that the paper will contribute to a better understanding of how to measure image and how to market (position) the North Atlantic Islands.*

Originality/value – *The study shows the value that image can have in marketing island destinations and the importance for destinations in peripheral areas to cooperate in their marketing activities.*

Keywords *Image, Perceptual mapping, Segmentation, Positioning, Island destinations, Tourism, Market position, Iceland*

Paper type *Research paper*

1. Introduction

Increasing internationalization leads to increased competition (Friedman, 2006). Accordingly, organizations and nations need to create a competitive advantage to be able to compete successfully for access to markets, materials and people (Anholt, 2003; Hooley *et al.*, 1998; Porter, 1998). The image of organizations and nations and the communication of image at the national and international level is important for the sustainability of this competitive advantage (Anholt, 2003; Ries and Trout, 2001). In November 2007, the Icelandic Prime Minister's Office assembled a committee to analyze the image of Iceland and come up with solutions regarding the possibility of strengthening the image internationally. The committee submitted its proposals in a report in March 2008. This report, *The Image of Iceland – Strength, Policy and Status*, states that the image of Iceland is important mainly in three areas. Namely, the image of Iceland as an investment alternative for foreign organizations, as a tourist destination for foreign travelers and for Icelandic goods and services that are exported (Prime Minister's Office, 2008).

The research reported here focuses on the image of Iceland as a travel destination for foreign travelers. The image of tourist destinations is important, influencing both the decision

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making behavior of potential tourists (Jenkins, 1999) and the level of satisfaction tourists experience, based on the actual experience at the destination (Chon, 1990). The image in the minds of potential travelers is so important in the destination selection process that the viability of the destination can be affected by the image the destination holds (Hunt, 1975). At the international level, destinations often compete on nothing more than the image held in the minds of potential travelers. Therefore, marketers of tourist destinations spend money, time and effort to create the right favorable image to guide prospective travelers in their decision to visit or re-visit their destinations. In the internationally competitive environment of today's tourism industry, marketers and developers of destinations should have a good understanding of travelers' image of their destination, as well as an understanding of the image travelers hold of competing destinations (Baloglu and McCleary, 1999). Creating and communicating a favorable image to potential target markets usually develops a competitive position for a destination among other tourism destinations in the minds of tourists (Calantone *et al.*, 1989; Gartner, 1993). A major objective of any destination positioning strategy will be to reinforce a positive image already held by a target market, correct a negative image, or create a new image (Pike and Ryan, 2004). Researchers have studied the image of cities, states and countries as travel destinations all around the world for the past 30 years (Pike, 2002; Tasci *et al.*, 2007). However, research on the image of Iceland as a travel destination is limited (Prime Minister's Office, 2008).

The Icelandic Tourist Board (Ferðamálastofa) has surveyed travelers' attitudes concerning their stay in the country (Icelandic Tourist Board, 2004a, b). They have also conducted image research in Germany, Britain, France, Sweden and on the East Coast of the US concerning the effects of whaling on the image of Iceland as a travel destination (Prime Minister's Office, 2008). The project, Iceland Naturally, designed to promote Iceland as a travel destination among other things, conducted image research in the US market since 1999 (Gudjonsson, 2005).

The research questions in this paper cover three issues. Firstly, what is the image of Iceland in the minds of foreign travelers? Secondly, what is Iceland's leading competitor among the comparison countries? Thirdly, what possibilities are there to position Iceland, the Faroe Islands, and Greenland as one travel destination? The goal is also to examine whether the position of Iceland, the Faroe Islands and Greenland together in tourist markets as one area is possible. The reason behind this goal is that areas that pooling their resources can have more marketing power if they cooperate than if they use resources separately (Buhalis, 2000; Cai, 2002; Haahti and Yavas, 1983). Since these countries are geographically close and are working together in trying to strengthen and coordinate their tourism planning, for example through the North Atlantic Tourism Association Agreement (NATA), (Icelandic Tourist Board, 2008a; Ministry of Industry, Energy and Tourism, 2008), this is an interesting goal. An unstructured survey and a structured (quantitative) survey, administered to tourists, tested these goals. The quantitative survey compares Iceland to five other travel destinations, Norway, Scotland, the Faroe Islands, Finland and Greenland. The result of this research will shed some light on the image of Iceland and the comparison countries as travel destinations.

2. The image of Iceland as a destination for tourists

Research on the image of destinations began in the early 1970s with Gunn's work in 1972 on how destination image is formed (Gunn, 1988), and Hunt's work (1975) on how destination image is measured (Gallarza *et al.*, 2002; Konecnik and Garnter, 2007; Nickerson and Moisey, 1999). In the years 1973 to 2000, at least 142 papers were published that directly or indirectly investigated destination image topics (Pike, 2002). Many possible approaches are available to study destination image, because the concept has many implications for human behavior (Gallarza *et al.*, 2002). Destination image concerns the field of environmental psychology, which utilizes assessment of cognitive or perceptual mapping, environmental response, environmental personality, environmental preference and affective qualities of places (Tasci *et al.*, 2007). In geography, destination image falls under the field of mental mapping. Mental mapping refers to the component of image that contains spatial

information concerning what is located where within a place. Knowledge of tourists' spatial maps may give insight into the composition of destination experiences (Walmsley and Jenkins, 1992; Young, 1999).

Numerous definitions exist of the concept of destination image and many authors have tried to get to the core of the concept (Gallarza *et al.*, 2002). Some authors have examined how the destination image concept has been defined in the literature (e.g. Echtner and Ritchie, 1991; Gallarza *et al.*, 2002; Tasci *et al.*, 2007). Hunt (1975, p. 1) defines image as: perception held by potential visitors about an area. Other academic articles most commonly cite Crompton's definition (Jenkins, 1999): the sum of beliefs, ideas and impressions that a person has of a destination.

Gallarza *et al.* (2002) write that image always corresponds to an interiorization of some perceptions and that not everyone has the same perceptions. According to them, destination image refers to tourists' perceptions of a destination. These correspond to the perceived contribution of various services at destinations, such as accommodation, food and transport (Gallarza *et al.*, 2002). Tasci *et al.* (2007) write that using perception of an image is theoretically inappropriate when potential tourists have not yet experienced perception through pictures or visitation. Baloglu and McCleary (1999) and Tasci *et al.* (2007) studied all the components proposed by destination image researchers, concluding that the three main components are cognitive, affective and cognitive. Cognition is the sum of a person's knowledge about a destination, which may be organic or induced. This is people's awareness, knowledge or belief about a destination. Affect represents an individual's feeling toward a destination. The conation component may be considered as the likelihood of visiting a destination within a certain time period (Baloglu and McCleary, 1999; Tasci *et al.*, 2007; Pike and Ryan, 2004). Tasci *et al.* (2007, p. 200) conclude that destination image is an interactive system of thoughts, opinions, feelings, visualizations, and intentions toward a destination.

Several authors (e.g. Echtner and Ritchie, 1991; Fakeye and Crompton, 1991; Gartner, 1993) have written about the lack of a conceptual framework for studying destination image. A number of authors have put together a conceptual framework for the components of destination image research, for example, Baloglu and McCleary (1999), Echtner and Ritchie (1991), Gallarza *et al.* (2002) and Tasci *et al.* (2007). Despite widespread interest in a unified destination image theory, no single approach is commonly accepted (Konecnik and Garnter, 2007). Many researchers agree that Echtner and Ritchie (1991, 1993) have contributed greatly to the framing of destination image (Gallarza *et al.*, 2002; Tasci *et al.*, 2007). Their study is the initial attempt in destination image research literature to link the main components of image together in a useful and interactive way (Tasci *et al.*, 2007).

2.1 Research method

The research uses two measurement scales; an unstructured scale to find the holistic image of Iceland and a structured scale to find the image of Iceland according to attributes. The unstructured scale (open-ended questions) allows participants to answer freely what their image of Iceland as a tourist destination is. The designed questionnaire employs three open-ended questions by Echtner and Ritchie (1993) along with three additional questions about participants' gender and travel behavior. The three open-ended questions are:

1. What images or characteristics come to mind when you think of Iceland as a tourist destination?
2. How would you describe the atmosphere or mood that you would expect to experience while visiting Iceland?
3. Please list any distinctive or unique tourist attractions that you can think of in Iceland.

Question one aims to find a functional holistic image, question two to find a psychological holistic image and question three to find a unique image of Iceland as a destination, coding the answers from the unstructured survey according to qualitative methodology.

The final version of the structured questionnaire consists of 22 questions. The first part of the questionnaire asks about people's image of Iceland and the comparison countries for 12 attributes:

1. Scenic and natural beauty.
2. Peaceful and quiet.
3. Good tourist facilities.
4. Friendly and hospitable.
5. Good food and drink.
6. Safe place to visit.
7. Good entertainment and nightlife.
8. Unique and different.
9. Opportunity for adventure.
10. Modern.
11. Wild.
12. Good cultural experience.

The attribute questions part uses a nine point Likert-type scale, where choice of answers ranges from description fits badly (1) to description fits well (9). Questions 13-15 ask about participants' demographic background and questions 16-19 about their travel habits in Iceland. Questions 20 and 21 measure destination loyalty (behavioral variables) and question 22 asks about participants' satisfaction with their trip to Iceland.

2.2 Survey implementation

The administration of the unstructured questionnaire took place at a Tourist Information Center, which is operated by the city of Reykjavik, in Adalstraeti 2 (Visit Reykjavik, 2008), on the 5 June 2008 from 10 a.m. to 12 p.m. The administration of the pre-test of the structured questionnaire took place at two tourist destinations, at Geysir on the 9th of June, from 17 p.m.-19 p.m. and at Gullfoss, on the 10 June, from 12 a.m.-14 p.m. The administration of the final version of the structured questionnaire took place at three sites. The first site is the main bus terminal in Reykjavik, BSI. From BSI buses travel, for example, to Keflavik International Airport and to a number of popular tourist destinations in Iceland (BSI, 2008). The second site is Gullfoss, which is a waterfall and one of the most popular tourist destinations in Iceland, situated in the south of Iceland (Visit Iceland, 2009). The third site is Blaa Lonid, which is a geothermal lagoon in the Reykjanes peninsula in the southwest of Iceland. The lagoon is also one of the most visited attractions in Iceland (Visit Iceland, 2009; Blue Lagoon, 2008).

The unstructured survey, the pre-test for the structured survey and the final version of the structured survey were all self-administered (Burns and Bush, 2006). The survey administrator stood at a predetermined spot in all of the survey sites and asked tourists who walk by if they had an interest in participating in a survey. Those tourists who agreed to participate then received the survey on paper and the administrator explained the main topic. After that, the participants filled out the survey at their own pace and handed the survey back to the administrator when completed.

Participants in the surveys were a convenience sample. That is, for the unstructured survey, for the pre-test and for the final version of the structured survey, the administrator drew convenience samples. Only those people that are present at the time of a survey's administration have a chance of being part of the sample (Burns and Bush, 2006). In total, 25 tourists participated in the unstructured survey, 15 males (60 percent) and ten females (40 percent). A total of 17 tourists participated in the pre-test of the structured survey, eight males (47 percent) and nine females (53 percent). A total of 394 participants answered the

final version of the structured survey, 125 in BSI, 165 at Gullfoss and 104 in Blaa Lonid. A total of 60 questionnaires were deemed unusable, because either too few questions were answered or the participants were from the comparison countries. The final sample consisted of 334 participants, 185 males (55.4 percent) and 149 females (44.6 percent).

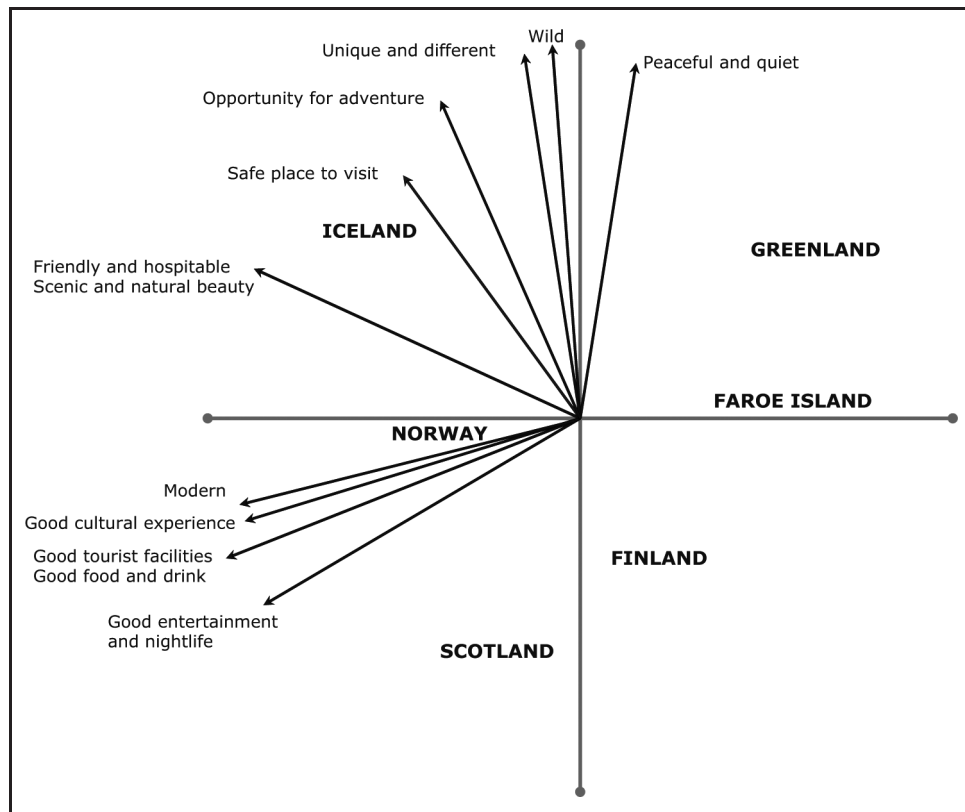
2.3 Results for the unstructured survey

Image results from the first question and three functional holistic image groups emerged from the coding. The biggest category is nature and scenery (geysers, wild nature, scenery, volcano/lava, waterfalls, mountains, glaciers, nature, water, clean, cold, skies). The second biggest category is activities (fishing, thermal pools, adventure, horse riding). The third group is culture and people (woolen sweaters, interesting history, Björk, art, innovation, low population, friendly, nice, modern, environmental, unique, and quiet). A number of atmosphere/mood images for Iceland emerged from question number two. The number in the brackets shows how often the adjective was mentioned by the participants: friendly (11), calm (five), relaxed (four), security/peace (three), alone (three), free/freedom (three), different (two), surprising (two), quiet (two). A number of unique places emerged from the third question, along with other places not unique to Iceland. The number in the brackets shows participants mentions of a place. First, the places unique to Iceland are: Geysir (15), Blue Lagoon (13), Gullfoss/waterfalls (nine) and the Golden circle (two). Next are places not unique to Iceland but nevertheless important parts of Iceland as a destination: Glaciers (five), whales (four), volcanoes (three), puffins (two), mountains (two) and museums (two).

2.4 The results for the structured survey

Figure 1 shows a two-dimensional perceptual map of the image that actual visitors in Iceland during summer months have of Iceland and the comparison countries as tourist destinations.

Figure 1 Perceptual map for all participants



The figure shows the results for the whole sample. Iceland is in the upper left corner of the perceptual map. Iceland is far from the middle, which shows that Iceland has a strong and clear image in people's minds. People connect Iceland most to the attribute safe place to visit. Iceland also has strong connections to the attributes friendly and hospitable, scenic and natural beauty and opportunity for adventure. Relatively close by is the attribute unique and different. According to these results, Norway is Iceland's closest competitor, since the country is nearest to Iceland of all the countries in the figure.

Norway is relatively close to the middle, on the left side of the vertical axis of the perceptual map. Since Norway is nearer to the middle than Iceland, people do not have as clear an image of Norway as they have of Iceland. Norway is considered modern and to offer a good cultural experience as a tourist destination. Norway also has connection to the attributes good tourist facilities and good food and drink, which seem to be the same attributes according to these results. The attribute good entertainment and nightlife is also relatively close by.

Scotland is far from the middle, indicating that people have a clear image of Scotland in their minds. Scotland connects most strongly to the attribute good entertainment and nightlife although the country positions some distance from that attribute. In the opposite direction of Scotland, the figure shows the attribute peaceful and quiet. This supports the position of Scotland as a country of entertainment and nightlife, since entertainment and nightlife seldom goes hand in hand with peace and quiet. Scotland is also slightly in the opposite direction of the attributes wild, unique and different, which might indicate that Scotland is neither wild nor unique and different in the minds of people traveling to Iceland.

Finland appears near the middle of the vertical axis. According to these results, Finland and Scotland have a similar position in people's minds and are therefore competitors. Yet respondents do not connect Finland with any attribute. Nevertheless, since Finland has a position in the opposite direction of Iceland, the interpretation can be that Finland and Iceland are quite different destinations in the minds of people, since they do not share similar attributes. These results imply that Finland is not wild, not unique and different, does not offer an opportunity for an adventure and is not a safe place to visit, at least not in comparison to the other destinations under study.

The Faroe Islands are in the middle of the horizontal axis of the perceptual map. The Faroe Islands do not connect to any attribute in the minds of people. The Faroe Islands are in the opposite direction of Norway. In a similar way as the connection between Iceland and Finland, this can be interpreted in such a way that the image people have of the Faroe Islands is of a destination that is not modern, does not offer a good cultural experience, good tourist facilities nor good food and drink. In addition, people do not associate the Faroe Islands with good entertainment and nightlife.

Greenland is in the middle of the upper right quadrant of the figure. This indicates that Greenland has a clear image in the minds of people. The country is positioned nearest to the attribute peaceful and quiet and in the opposite direction of the attribute good entertainment and nightlife. Similar to the Faroe Islands, people perceive Greenland as not offering the attributes good tourist facilities, good food and drink nor good cultural experience. People also see Greenland as not being a modern destination.

3. Discussion

The three research questions aimed to find out actual visitors' image of Iceland as a tourist destination. Actual tourists traveling in Iceland participated in an unstructured survey that measured the holistic image of Iceland and a structured survey that asked about their image of Iceland in comparison to Norway, Scotland, the Faroe Islands, Finland and Greenland, for 12 attributes.

Results from the unstructured survey indicate that travelers have the strongest holistic image of Iceland as a scenic nature destination. They also have an image, although to a lesser extent, of a destination offering a number of activities and that the country possesses

interesting people and culture. Furthermore, they believe the country to be friendly, calm, relaxed and secure and to offer people freedom and the chance of solitude. Results indicate that Iceland has something unique to offer, mentioning Geysir, the Blue Lagoon and Gullfoss in this respect, along with non-differentiated offerings such as whales, puffins, volcanoes and museums. Results from the structured survey indicate that the image tourists in general have of Iceland as a tourist destination is of a country that is a safe place to visit, offers opportunity for adventure, is friendly and hospitable and possesses scenic and natural beauty. Results also indicate that people have a strong and clear image of Iceland since the country lies far from the middle of the perceptual map.

In comparison to the messages that the image report from the Prime Minister's Office (Prime Minister's Office, 2008) wants to communicate, the messages from this survey indicate are power, freedom and peace, thus Iceland's unique identity should be one of natural power. In comparison, one can claim that safe place to travel and peace are similar concepts, so travelers to Iceland already have a peace image of the country. From one perspective, one can argue that offering opportunity for adventure is freedom so travelers to Iceland possibly have a freedom image of the country already. The concepts scenic and natural beauty and natural power can also have the same interpretation, so travelers already have the image of the country as possessing natural power.

Upon examination, the results of the perceptual maps indicate strongly that Norway is Iceland's main competitor for tourists. Tourists see Iceland and Norway as similar destinations. In comparison, they perceive Iceland to be safer and more adventurous and Norway to offer better facilities for tourists, better food and drink, better entertainment and nightlife and to offer a better cultural experience. If Iceland wants to position itself as a destination offering better facilities, then the country first has to build facilities up to the standards held by the tourists whom Iceland has chosen to serve.

According to the results, Iceland, the Faroe Islands and Greenland seem to have a different image in the minds of tourists and they seem to be offering a different product. Of these two comparison countries, Iceland and Greenland seem to have more in common than Iceland and the Faroe Islands. Although these countries can hardly position themselves together, this should not dissuade them from working together to plan the area as a tourist region or cooperating in their marketing and promotion activities. These island countries could benefit from working together to try to get tourists to pick the islands cluster to traveling to instead of, for example, the area (destination) that comprises Norway, Sweden, Finland and Denmark. Moreover, if Iceland and Greenland were to position themselves together as one product (destination), they could use the attributes peaceful and quiet, wild and unique and different to market the group.

4. Limitations and further research

A convenience sample selected the survey respondents, so these findings are not generalizable for the wider population. The results, however, should give a good idea about the image tourists have of Iceland as a tourist destination. The weather at the survey sites was always good during the survey submission. That could have influenced participants' mood and their answers. The tourists asked about the image of Iceland are already in the country, which could influence their perception, in comparison to other countries. Maybe some other result would have emerged from a survey of tourists in Norway, for example. In addition, because the tourists have gone through the process of placing Iceland in their opportunity set and their decision set, they decided that Iceland is a product worth buying, so to speak. This could influence the image tourists have of Iceland. The structured survey did not attempt to find out if the attributes used were those that tourists to Iceland find important as part of their image of destinations. Possibly some other attributes should have been used in the survey; people may not have known the comparison destinations well enough to make a comparison to Iceland and this could maybe have skewed the results. Further, we could make comparison with distant, rather than close destinations, for example, New Zealand or Japan. Perhaps these are alternative destinations when people consider traveling to Iceland.

The unstructured survey had few participants, only 25, and the coding is the interpretation of one individual. Maybe some other groups would have emerged if someone else had coded the data. Despite these limitations, the results should give some ideas about the holistic image that tourists may have of Iceland as a tourist destination.

Destination planners and researchers could measure the image of Iceland as a tourist destination at three levels; pre-travel level, during visit level and post visit level, using the same attributes consistently to see if the image has changed during the period. Iceland's target markets need defining before measurement takes place however. For instance, different nations like Germany, England and the US and age groups within or across nations may be target market segments. Different lifestyle segments, like adventure seekers or nature lovers, could also be target markets. Finding the preferred attributes is also important. These attributes can be different depending on the target market under study.

For the during visit level, further research could concentrate on subgroups of tourists, such as samples of Germans or Americans only, or perhaps concentrate on a specific age group like young traveler. The difference in image based on tourists' traveling style is also interesting, such as concentrating on a backpacker's subgroup as done in Australia backpackers (e.g. Ross, 1993). Another example might be to compare sub-groups, such as, do bicyclists have a different image of Iceland compared to that of people who buy a package tour and travel by bus? One could also investigate the image held by tourists during visits in different seasons. Maybe winter travelers have a different image of Iceland than summer travelers.

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