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Positioning the city product as an international tourist destination: Evidence from South Africa

Abstract

Increased competition among international tourism destinations has turned many countries to seek growth from destination branding and positioning strategies. The most popular type of destination of interest for positioning studies has been countries, followed by states and very few studies have focused on city products. This study aims at contributing to city marketing and positioning literature. The objectives of this study are two-fold: firstly to identify whether cognitive images of Cape Town are perceived differently from that of Johannesburg, Durban and Pretoria, and secondly, whether demographic and travelling characteristics have an impact on image perceptions. A systematic sample of international visitors was interviewed using the face-to-face method, which led to a response rate of 199 completed questionnaires. Correspondence analysis revealed that Cape Town was perceived to be similar to the other three cities on attributes such as service levels, variety of accommodation, and transport and infrastructure. The other three cities were rated worse than Cape Town in terms of variety of activities, attractions and scenery, and to some extent safety. Additional analyses showed that demographic and travelling characteristics had a significant influence on perceived image of the various cities. The results of the study therefore suggest that attributes such as nightlife, friendly people and culture could be used more effectively to differentiate Cape Town. Thereof, the marketing implications are highlighted.

Keywords:

destination positioning; destination image; city marketing; city competitiveness; correspondence analysis; Cape Town

Introduction

Already an enormous global industry, tourism seems to offer the quickest route to economic and social development of emerging nations. This has been no different for South Africa given the growing interest of international travellers to visit the country and its cities. Tourism is of significant importance to the South African economy as it contributes almost 7.4% to GDP and employs 6.6% of the country's formal workforce (SA Tourism, 2004).

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Favourite provinces for holidays were Gauteng and Western Cape, mainly for activities such as shopping, nightlife, social experience and wildlife. The province of Gauteng is home to three major cities namely Johannesburg, Soweto and Pretoria (now called Tshwane). While Johannesburg is considered the business capital of South Africa, Pretoria is regarded as the administrative capital of the country. The province of Western Cape is home to the city of Cape Town, the leading international tourist destination for South Africa (George, 2003; Rogerson & Visser, 2005). The picture is incomplete without the city of Durban, renowned for its beaches and cultural experience. The city is located in the province of Kwa-Zulu Natal, another of nine provinces. With these different city products, positioning becomes critical to ensure that economic and social benefits of tourism are equitably distributed among provinces and cities. Altogether, there seems to be much product overlap among the various cities and European visitors to South Africa, have consistently expressed disappointments surrounding the country's 'dull cities' (Monitor, 2004). With so many different competitors in the Sub-Saharan African region, making places substitutable, South African cities have been fighting for increasing market share among international travellers by making city marketing and positioning an integral part of their tourism strategy at both provincial and local levels (Prayag, 2004).

Research on destination positioning in the tourism literature has been primarily driven by destination image studies (Gartner, 1989). Lovelock (1991) describes positioning as the process of establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings. Given that the destination experience is often an amalgam of various services provided by tourism suppliers (Murphy, Pritchard & Smith, 2000; Vogt & Fesenmaier, 1995), it can be argued that positioning a destination is a difficult task. Consequently, most positioning studies have relied on images as the starting point for understanding tourists' perceptions of a place given that image is a key construct in destination positioning (Pike & Ryan, 2004). This approach is limited as it identifies strengths and weaknesses of image attributes with no specific reference to which attributes should be used for destination promotion (Crompton, Fakeye & Lue, 1992). However, the contribution of image research in developing, reinforcing or changing the image of a destination is well documented (Kim, Chun & Petrick, 2005a). The positioning concept is concerned with three issues: the segmentation decision, image, and selection of destination features to emphasise (Aaker & Shansby, 1982). Destination marketers recognise that image of their product or brand in the consumer's mind is of more importance to ultimate success of a destination than its actual characteristics (Nickerson & Moisey, 1999; Morgan & Pritchard, 1998). Destination marketers try to position their brand so that consumer perceptions are favourable and the brand is perceived as occupying a niche in the marketplace occupied by no other brand. However, of more importance for positioning studies are the projected and perceived images of destinations. The projected images are the conscious effort on behalf of destination marketers to create enticing and vivid images of a place, while the perceived images are how visitors' actually see the place (Andreu, Bigne & Cooper, 2000). Recognising the importance of perceived images in the positioning of a tourist destination, the research questions guiding this study are as follows:

- How the tourism product of Cape Town is similar or different from that of Johannesburg, Durban, and Pretoria on a number of image attributes?
- Whether demographic and travelling characteristics have any significant influence on perceived image of the various cities?

These questions were adapted from those used by Uysal, Chen & Williams (2000) in their assessment of the regional competitiveness of Virginia vis-à-vis ten other U.S. states. The study is similar in conceptualisation and methodology to that of other authors such as (Chen, 2001; Kim, Guo & Agrusa, 2005b; Haahti, 1986) but differs in terms of the analytical method used. The study employs correspondence analysis, which is a technique not often used in positioning studies (Andreu et al. 2000; Calatone, di Benedetto, Hakam & Bojanic, 1989) in the tourism field. Also the destination of interest is cities, which has received lesser attention in the literature as compared to countries and states (Pike, 2002; Rogerson & Visser, 2005). Next, the relevant literature is presented followed by the research methodology. Thereafter, the analysis and discussion of the results are presented, and the paper concludes with managerial implications of the findings, limitations of the study and areas of future research.

Destination image and positioning

Positioning a destination has a number of challenges, two of which are inherent in marketing a service, namely intangibility and inseparability. 'Intangibility leads to consumer uncertainty since the destination marketer is effectively selling an experience' (Ryan, 1995, p. 40). Because of this, an explicit positioning strategy is valuable in order to help prospective visitors to get a 'mental fix' on the product that may otherwise be amorphous (Lovelock, 1991). The second challenge relates to the inseparability of the production and consumption processes. 'The multitude and diversity of tourism suppliers in the destination makes control and cohesion of the destination experience a difficult task' (Alford, 1998, p. 57). Therefore, destination positioning is an attempt to control the quality of experience, through for example, classification and grading of hospitality products. Hence, destination positioning is about the philosophy of understanding and meeting unique consumer needs. For destination marketers, the value of positioning lies in the link it provides between destination management and external competitive environments.

The role of destination image in positioning has been the focus of many studies recently (Chen & Uysal, 2002; Day, Skidmore & Koller, 2002; Kim et al., 2005b; Pike & Ryan, 2004; Uysal et al., 2000), which has resulted in a greater understanding of tourist behaviour. But the overall conclusion seems to be that there is still no agreement of how best to conceptualise and measure destination image (Beerli & Martin, 2004; Dann, 1996; Echtner & Ritchie, 1991). Most studies corroborate that tourists' images of a place evolve at two levels, organic and induced. The former derives from non-tourism communication and the latter from DMOs (Destination Marketing Organisations) conscious marketing efforts. The actual visitation results in a complex image of the place (Fakeye & Crompton, 1991). Therefore, it is evident that perceptions of potential visitors have a significant influence upon the viability and long-term survival of a tourist destination (Seddighi, Nuttall & Theocharous, 2001). The concept of image has been studied further to reveal that overall image of a destination is shaped by perceptual/cognitive and affective evaluations, which are in turn shaped by variety and type of information sources, age, education, and socio-psychological motivations (Baloglu & McCleary, 1999). Additionally, Echtner & Ritchie (1993) proposed that destination image consists of three dimensions: attribute-holistic, functional-psychological, and common-unique. These dimensions provide DMOs with specific constructs that can be used effectively for branding and positioning of a place.

Many image studies have been focused on identifying places relative strengths and weaknesses (Gartner & Hunt, 1987) in an attempt to build competitive advantages for destination brands. Almost all researches rely on the use of a piecemeal (or attribute

based) approach via scaling methods (such as semantic differential scale, likert-type scale, and multidimensional scale) that capture only the individual attribute component of destination image but not the holistic component (Beerli & Martin, 2004; O'Leary & Deegan, 2005). It cannot be assumed that destination attributes on their own and in themselves are motivationally adequate to explain why individuals or groups gravitate towards one place and not to another (Dann, 1996). Some recent works, however, studied both cognition and affect toward environments and destinations (Baloglu & McCleary, 1999; Baloglu, 1998; Echtner & Ritchie, 1991; MacKay & Fesenmaier, 1997; Pike & Ryan, 2004). Cognitive components are tourists' prior product knowledge while the affective reflects related feelings (Chen & Uysal, 2002). Researches have attempted to use one or both components to delineate market positioning. Pike & Ryan (2004) add a conative component, which is analogous to behaviour, as having an impact on desired positioning. Thus, positioning frameworks for destinations, suggest that a combination of affective components of image (push attributes), cognitive components (pull attributes) and an individual's intent (likelihood for purchase) influence overall positioning in the minds of visitors.

Positioning studies in the literature have focused on comparing competitive destinations on a number of predominantly cognitive attributes (Andreu et al., 2000; Botha, Crompton & Kim, 1999; Chen & Uysal, 2002; Crompton et al., 1992; Gartner, 1989; Goodrich, 1978; Haahti, 1986, Kim et al., 2005a,b). Andreu et al. (2000) investigated the projected and perceived images of Spain among British travellers in ten tourist zones. They concluded that the areas are significantly 'unknown' and the perceived image of Spain is not homogeneous. Botha et al. (1999) identified the strengths of Sun/Lost city compared to its main competitors on a number of destination attributes. The main conclusion was that the most salient attribute defining the product was gambling and that needed to be revised to incorporate multiple activities and attractions. Chen & Uysal (2002) analysed the positioning of Virginia compared to eight other U.S. states in image perceptions. Virginia was found to be similar to Pennsylvania but different to other states and least competitive with Florida and Washington D.C. among images of activities and attractions. Gartner (1989) explored the competitiveness of four U.S. states on recreational attributes and he found that Montana and Wyoming were perceived to be outdoor recreation areas with natural resources, while Utah and Colorado were anchored more towards cultural resources. Haahti (1986) identified the position of Finland as a summer holiday destination vis-à-vis ten competing European countries. According to his findings, Dutch respondents perceived Norway and Finland similarly on attributes of 'friendliness' and 'hospitality', and 'wilderness' and 'camping' compared to those of other countries. Kim et al. (2005b) explored the preference and positioning of seven overseas destinations by mainland Chinese tourists. They found that respondents preferred Australia as an overseas destination and showed a relatively high level of preference to Singapore and Egypt in comparison to Japan and South Korea that were least preferred. All these positioning studies point out that positioning analysis forms the basis for strategic marketing decisions as it forces marketers to fully assess the competition, tourists' perceptions, and to determine salient destination attributes. However, these studies indicate a clear bias towards countries and states as the destination of interest as opposed to cities. In fact, Pike (2002) notes that the city has received limited interest on behalf of researchers. In his review he found only 26 studies relating to cities from 1973 to 2000 but few have focused on city positioning.

Destination positioning is incomplete without engaging in a discussion of issues such as destination branding and destination competitiveness. Destination branding plays a prominent role in visitors' perceptions of destination image and hence positioning.

The relationship between destination image and branding has been the focus of many studies in recent years (see Chen, 2001; Chen & Uysal, 2002; Foley & Fahy, 2004; Ibrahim & Gill, 2005). The overall conclusion seems that branding and positioning have a symbiotic relationship. Branding refers to 'what images people have of a country, city or region and what kind of relationship they have with it while positioning on the other hand, takes the images and define the city, region or country by showing how it compares to competitors' (Nickerson & Moisey, 1999, p. 217). Destination competitiveness on the other hand, depends on a number of interrelated factors such as ambience, attractions, amenities, accessibility and so on. The destination must seek to maximise its performance on each individual element mentioned (Buhalis, 2000) as well as synergies between these elements that eventually determine the attractiveness of a destination. Bordas (1994: 3) argues that 'true competitiveness is not established between countries but between clusters and tourist businesses', which in essence defines the city product. Hence, competitiveness of specific cities has a significant impact on the competitiveness of a destination. A synergistic relationship exists between the two. This is similar to Porter's (1985) view on the competitiveness of a firm where a firm is competitive up to the extent that its products and services are competitive. The competitiveness of a destination and how the destination differentiates itself from competitors will therefore determine how consumers perceive it. Next, a discussion of city marketing and positioning follows.

City marketing and positioning

'The tourism industry is seeing fiercer competition among different city destinations' (Dolnicar & Grabler, 2004, p. 99). Tourism in cities and tourism promotion of inner-cities is not a new phenomenon (Rogerson & Kaplan, 2005). Many urban governments have turned to tourism as one element of strategies for economic regeneration, restructuring, and local economic development. Often the outcome has been in the form of successful logos and slogans such as New York City's 'The Big Apple' or 'I ♥ NY' campaigns (Kotler, Heider & Rein, 1993), and Auckland's 'City of Sails' (Lawton & Page, 1997). Bramwell & Rawding (1996) note that there is a proliferation of city images consciously designed to attract tourists, investors and government officials as well as to build self confidence and pride in local residents. Image initiatives are now a central element of urban regeneration (Rogerson & Kaplan, 2005). Cities are reviewing their positioning to boost the local economy, enhance cultural and other tourism facilities, and improve city image. Images are being built to sustain competitive advantage and brands developed to tangibilise the city experience. Bramwell & Rawding (1996) found many similarities between five British cities in their overall tourism marketing strategies, notably they all used the big city imagery of exciting and lively cosmopolitan cities, with lots to see and do along with a dynamic, upbeat and culturally enlivened experience. Murphy et al. (2000) focused their study on the city of Victoria, capital city of British Columbia in Canada. They concluded that climate, scenery, ambience and to a lesser extent cleanliness were key predictors of destination quality and trip value. Hence, they suggest that destination marketers must actively manage the mix of restaurants, attractions, hotels and other infrastructure to develop a consistent image for different target segments.

A city with all the right 'mix' of attributes for different target markets will attract visitors (van Limburg, 1998). For example, Oppermann (1996) suggests that all cities should capitalise on business tourism, as it can be a major source of off season demand. According to his findings, of the 30 North American city conference destinations, San Diego achieved the highest ratings in destination attributes followed by San Francisco, New Orleans and Orlando. Attributes that were of most importance to association

meeting planners included climate, hotel service quality, clean/attractive location and city image. South African cities have followed with the construction of new international convention centres in Durban, Johannesburg and more recently in Cape Town (Rogerson & Visser, 2005) as tourism planners have realised the lucrative activity of MICE (Meetings, Incentives, Conferences & Exhibitions) tourism and the attraction of 'mega events' to the country.

Moreover, some city destinations have used branding and positioning to correct a negative image. Ahmed (1991a) recognises the great effort and expenses required to change a negative image into a positive one. Atlantic City, New Jersey, for instance introduced casino gaming in an attempt to create a new image for itself. The city of Johannesburg has followed a similar route as part of its 'Joburg 2030 framework' (Rogerson & Kaplan, 2005), while coastal cities such as Cape Town and Durban are vying for tourism growth through shopping tourism with developments such as 'Century City' and 'The Gateway'; cruise tourism with the sector bringing over R60million to the local and provincial governments in 2003; sports tourism with the hosting of mega events such as Rugby and Cricket World Cups, and 2010 FIFA World Soccer Cup; political tourism through the development of Robben Island in Cape Town, and township tourism in Soweto and Alexandra; second homes tourism and medical tourism (Rogerson & Visser, 2005). As can be seen from the examples above, South Africa is currently using tourism promotion as an element of economic development in all major cities. Nevertheless, the views of residents in such developments should not be ignored as the images of city destinations might differ between tourists and residents. Such differing perceptions can be a cause for positioning errors and confused images for recipients of advertising and promotion campaigns. Jutla (2000) identified such a gap for the city of Simla in India, where tourists' image perceptions were based on natural and cultural landscapes whereas residents' images were based on safety, quiet and peaceful place, tourists' created congestion, and a high cost of living. Both tourists and residents were dissatisfied with the present development of Simla. Lawton & Page (1997) found that confusion may exist in the minds of DMOs and tourism stakeholders as well, in terms of defining and delimiting the city product. Their study indicated that there was a lack of understanding on behalf of tourism operators in understanding tourists' expectations, which resulted in a mismatch between demand and supply of the tourism product in Auckland.

However, cities require consensus on four areas for ensuring successful brand positioning and long term competitiveness: target market, nature of competition, point of parity associations, and point of difference associations (Keller, 1998). The city marketer must first ascertain which destination attributes determine choice. Based on realistic strengths and weaknesses assessment of the destination and its competitors, the decision can then be made as to which market segments to target and with which products/services. Subsequently, images to market the city can be developed. Foley & Fahy (2004) recommend these images should be pre-tested in target markets so that promotion strategies are effective. Inevitably, distribution and pricing strategies progress naturally from clear destination positioning. Optimal positioning for Cape Town is a process of pinpointing, substantiating and delivering competitive advantage to create brand growth (Cape JMI, 2001). Positioning provides a focus and mechanism for making choices, which improve the effectiveness of external marketing activity and guides internal development of the brand.

Methodology

The goal of this study was to identify predominantly cognitive images that were deemed important by international visitors in selecting a city destination. This approach has been suggested as adequate for exploratory destination positioning studies (Chen, 2001). Two techniques were used to develop a set of cognitive scale items similar to those used by various authors (Kim et al., 2005b; Haahti, 1986; Pike & Ryan, 2004). The first technique was a review of destination image and positioning literature, which revealed many attributes that could be used in a survey. Personal interviews (n=10) with tourism decision makers and academics in Cape Town, allowed the list to be narrowed down to ten most important cognitive attributes namely: friendly people, safety, good weather, variety of activities, service levels, variety of tourist attractions and natural scenery, culture, nightlife and entertainment, transport and infrastructure facilities, and variety of accommodation. This was similar to the number of attributes used to measure tourists' image perceptions in other studies (Goodrich, 1978; Haahti, 1986; Kim et al., 2005b). The survey instrument was designed mainly with likert-type scales to capture visitor perceptions, and measured respondents' perceptions of Cape Town, their ratings of the city vis-à-vis other cities, demographic and travelling characteristics. The grid questionnaire format was preferred as it provided more efficient use of questionnaire space and achieved a higher response rate due to its simplicity and shortness (Haahti, 1986). Driscoll, Lawson & Niven (1994) supported this assertion that the grid format induces a more carefully evaluated set of comparative responses and they demonstrated how it performed better than the scaled version. Respondents were asked to rate the three cities, Johannesburg, Pretoria and Durban using a 3-point rating scale anchored at 1=Better than Cape Town, 2=Similar to Cape Town, 3=Worse than Cape Town. A pilot study was conducted with ten international visitors and revealed no problems.

Bearing in mind the exploratory nature of the study, and tourism statistics for Cape Town, which showed on average 1.2 million international visitors over the last two years. A probability sampling procedure was adopted, given that the sampling frame consisted of international tourists having stayed in Cape Town for at least a week and that had visited at least one of the cities, Johannesburg, Durban, and Pretoria in the last two years. The sample size was calculated as per the recommendations of Sarantakos (1998, p. 163), 'for populations of one million or more, a reliable sample is 384 respondents'. A systematic sample of visitors was selected from a random sample of tourist attractions in Cape Town, using the next to pass approach (every second person). The face-to-face method of interview was used to collect the data. A response rate of 51.8% was achieved, due to high refusal rates. A total of 199 questionnaires were used for data analysis. Positioning studies have used varied statistical methods to analyse consumer perceptions. The most popular techniques have been factor analysis, multi dimensional scaling, analysis of means, t-tests, and cluster analysis (Pike, 2002). 'There is no technique that has proven to be superior... the application of a specific technique heavily depends on the data structure' (Dolnicar & Grabler, 2004, p. 100). Correspondence analysis has received limited application in marketing and tourism studies. It has the advantage of requiring categorical data, which other multivariate techniques cannot handle without violating their statistical assumptions (Calatone et al., 1989). Hence, this study makes the use of two techniques, correspondence analysis and analysis of means to achieve the research objectives. Data was analysed using STATISTICA (version 5.5) and SPSS (version 10.1).

Findings

The demographic and travelling profiles of respondents are shown in Table 1 below. As can be noted, the majority of respondents (44.4%) were aged between 24 and 41 years old. The survey polled almost equal number of males (50.3%) and females (49.7%). Most international visitors were from European countries: UK (34.2%), Netherlands (14.6%), and Germany (18.1%). In terms of monthly income, 56.9% of respondents were earning between \$500 and less than \$9500 per month. In terms of travelling characteristics, 51% of respondents were visiting Cape Town first time, while the rest had visited the city on average 3 times previously. The main purpose of visit was for holiday purposes (73.9%) and very few were visiting for business purposes (7.5%), and visiting family and friends (9.5%). A significant majority was travelling with family (31.7%), friends (24.1%), partner (30.6%), and alone (11.1%). Other cities visited by respondents besides Cape Town include Durban (40.7%), Pretoria (16.1%), and Johannesburg (43.2%). Respondents stayed on average between six to ten days in Cape Town, while they stayed between sixteen to twenty days in South Africa.

Table 1

DEMOGRAPHIC AND TRAVELLING CHARACTERISTICS OF SAMPLE

Age yrs old	%	Purpose of visit	%
<18	0.50	Holiday	73.86
18-23	11.55	Business	7.53
24-29	12.56	VFR	9.54
30-35	17.32	VFR/holidays	2.51
36-41	14.25	Holidays/business	1.5
42-47	9.16	Other	5.06
48-53	8.72	Travelling	
54-59	11.65	Family	31.65
>59	14.29	Friends	24.12
Gender		Partner	30.65
Male	50.25	Alone	11.05
Female	49.75	Other	2.53
Country of origin		Income US \$ per month	
UK	34.17	<500	27.75
USA	7.03	500-3,499	20.81
Netherlands	14.57	3,500-6,499	20.08
Germany	18.09	6,500-9,499	16.02
Australia	2.01	9,500-12,499	3.49
Norway	1.00	12,500-15,499	3.49
Belgium	1.50	15,500-18,499	1.43
Switzerland	1.50	18,500-21,499	0.65
Sweden	2.01	21,500-24,499	1.43
Canada	1.50	24,500-27,499	0.65
Other	16.57	>=27,500	4.2

The first stage of the data analysis involved the use of correspondence analysis, which is an interdependence technique that uses singular value decomposition to analyse contingency tables from multinominal data (Thompson, 1995). The main interest of the

method lies in the characterisation of the structure of the row and/or column variables. Its most direct application involves portraying the correspondence of categories of variables (Chen & Uysal, 2002). The correspondence method is appropriate for an exploratory data analysis technique (Malhotra, 1996). The benefit of this technique is in its unique ability to represent rows and columns in a joint space (Hair, Anderson, Tatham & Black, 1998). However, its main limitation is, as a multivariate technique, it does not contain a rigorous test of significance. Nevertheless, the absolute contributions to inertia are the key statistics in the interpretation of the technique (Calatone et al., 1989). The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy was 0.797, which is considered adequate (Hair et al., 1998; Malhotra, 1996) and therefore suitable for correspondence analysis. Correspondence analysis of destination image attributes was undertaken and a 9x10 contingency table was derived. As shown in Table 2, a three-dimensional solution would explain most (93.2%) of the variance. Contributions to inertia indicate the percentage of variance explained by each point (attribute) in relation to each of the axes (Calatone et al., 1989). Attributes with a large absolute contribution to axes are identified as being important in determining the direction of the axis. Also, as Hair et al. (1998) suggested, cumulative variance could be used as a criterion to determine dimensionality. To better balance the explained variance and interpretability, this study selected a two dimensional solution to determine the positioning of each city on the earlier mentioned attributes given that cumulative variance explained is marginal for the third dimension.

Table 2

EIGENVALUES AND INERTIA EXPLAINED BY EACH DIMENSION

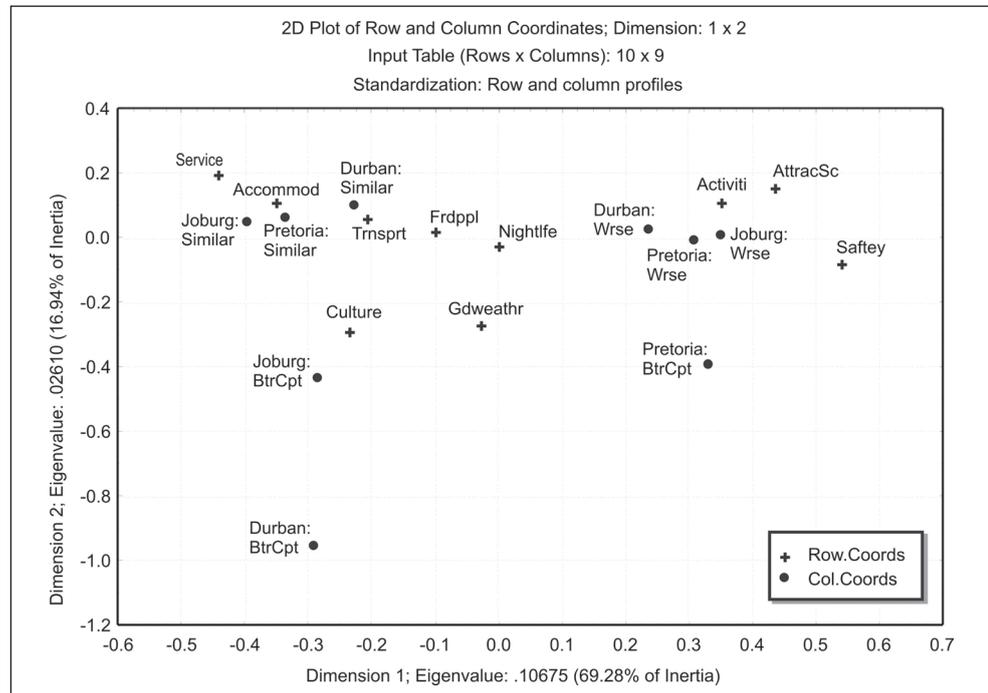
Dimensions	Singular values	Eigen-values	Perc. of inertia	Cumulative percent	Chi squares
1	0.32	0.11	69.28	69.28	249.80
2	0.16	0.03	16.94	86.22	61.07
3	0.10	0.01	7.05	93.27	25.43
4	0.08	0.00	3.91	97.18	14.09
5	0.06	0.00	2.06	99.24	7.43
6	0.03	0.00	0.72	99.96	2.61
7	0.01	0.00	0.03	99.99	0.12
8	0.00	0.00	0.01	100.00	0.03

Total Inertia=0.15 Chi²=360.58 df=72 p=0.00

To further visualise the relationship between a row and column variable, canonical normalisation was used (Chen, 2001) to derive a perceptual map portraying the relative position of each city's attributes and whether they were similar, worse than or better than Cape Town. The proximity between a pair of points is used to interpret the underlying relationship between points. For example, closely aligned points on each dimension reveal a strong relationship. The two dimensional correspondence analysis was used to derive a perceptual map (Figure 1).

The figure above shows that dimension one explains most of the variation in the data (69.3%) and dimension two explains only (16.9%) of variance. As indicated earlier, closeness of points shows a significant association. Thus, on the left hand side of the perceptual map there are significant associations between the following attributes: service level, variety of accommodation, and transport and infrastructure, which are perceived to be similar with Cape Town for cities Johannesburg, Durban, and Pretoria.

Figure 1
PERCEPTUAL MAP OF ATTRIBUTES RATING OF CAPE TOWN VIS-À-VIS OTHER CITIES



On the right hand side of the perceptual map, significant associations can be found between attributes: variety of activities, attractions and scenery, and to some extent safety, which are perceived to be worse than Cape Town for cities Durban, Pretoria and Johannesburg. It is interesting to note that no cognitive attributes are associated with 'better than' for the three other cities that competes with Cape Town. The associations on dimension two are more or less similar to dimension one, with a weaker association between culture and good weather, which are perceived to be better than Cape Town for the city of Johannesburg. This is not different from what the author expected. Johannesburg being the business capital, the culture is less relaxed compared to Cape Town and Durban. Surprisingly enough, nightlife and friendly people are not clearly associated with any cities. Thus, dimension one interpretations provide the most realistic perceptions of respondents. The qualitative research with the ten stakeholders corroborates with these findings, which confirms that Cape Town offers a better experience than other cities in South Africa in terms of scenic beauty, variety of attractions and perceptions of safety.

The second stage of data analysis involved the use of ANOVA to identify any significant differences in perceived images of Cape Town vis-à-vis its competitors based on demographic and travelling characteristics of respondents. Table 3 shows that indeed there are significant differences in image perceptions of the various cities, Scheffé's test was used for pair wise post-hoc comparison of means.

As shown in Table 3, significant differences were found between image attributes of Johannesburg: friendly people, safety levels, variety of activities, service levels and age, length of stay in SA, and gender respectively, in comparison to the city of Cape Town. Post-hoc comparisons revealed a significant association ($p\text{-level}=0.0237$) between those aged 18-23 years old who rated friendliness of people of Johannesburg far worse than Cape Town, in comparison to 24-29 years old, who rated the city similar to Cape Town in friendliness. In terms of safety levels, Scheffé's test revealed a significant

association (p-level=0.0126) between the former and length of stay in South Africa. Visitors, who on average spent between 6-10 days in South Africa, perceived Johannesburg safety levels to be worse than Cape Town, in comparison to visitors who spent between 26-30 days in South Africa who perceived the city's safety levels to be similar to Cape Town. This is similar to the findings of George's (2003) study on tourists' perceptions of safety in Cape Town. Similarly, a significant difference was found between demographic variable gender and variety of activities (p-level=0.0125) and service levels (p-level=0.03001). On average males had far worse perceptions of activities in Johannesburg compared to Cape Town, while females perceived the activities to be similar to Cape Town. Females perceived service levels in Johannesburg to be better than Cape Town, in comparison to males who perceived service levels to be similar to Cape Town.

Table 3
ANALYSIS OF MEANS ON IMAGE ATTRIBUTES AND DEMOGRAPHIC/TRAVELLING CHARACTERISTICS

Cities/Attributes	Demographic & travelling characteristics					
	Age	Length of stay SA	Gender	Income	Travel arrangement	Country of origin
Johannesburg	N.S	N.S	N.S	N.S	N.S	N.S
Friendly people	2.89*	N.S	N.S	N.S	N.S	N.S
Safety levels	N.S	3.03*	N.S	N.S	N.S	N.S
Variety of activities	N.S	N.S	10.89*	N.S	N.S	N.S
Service levels	N.S	N.S	4.81**	N.S	N.S	N.S
Durban	N.S	N.S	N.S	N.S	N.S	N.S
Variety of nightlife & entertainment	N.S	N.S	N.S	2.57**	N.S	N.S
Variety of accommodation	2.41*	N.S	N.S	N.S	N.S	N.S
Friendly people	N.S	4.49*	N.S	N.S	N.S	N.S
Pretoria	N.S	N.S	N.S	N.S	3.03**	N.S
Culture	N.S	N.S	N.S	N.S	N.S	2.46**
Variety of nightlife & entertainment	5.91*	N.S	N.S	N.S	N.S	2.85**

N.S= Not Significant, *p<0.01, **p<0.05

For the city of Durban, significant differences were found between image attributes: variety of nightlife and entertainment, variety of accommodation, friendly people, and demographic variables income, age and length of stay in SA respectively. Post-hoc comparison of means revealed a significant association (p-level=0.0430) between respondents earning less than \$500 per month, who rated variety of nightlife and entertainment as worse than Cape Town, in comparison to those earning between \$12500 and \$15499, who rated the same image attribute as similar to Cape Town. A significant association (p-level=0.0417) was found between age and variety of accommodation, where those aged in between 18 to 23 years old rated Durban as similar to Cape Town on accommodation, while those aged in between 54 to 59 years old rated the city's accommodation types as better than Cape Town. Likewise, a significant association (p-level=0.02009) was found between friendliness of people and length of stay in SA, where those who stayed in SA in between 6 to 10 days found Durban friendliness worse than Cape Town, in comparison to those who stayed in between 21 to 25 days who rated the city similar to Cape Town.

The most interesting significant associations between image attributes and demographic/travelling characteristics were for the city of Pretoria. Among image attributes, culture, and nightlife and entertainment, significant associations were found with travel arrangements and country of origin for the former; and age and country of origin for the latter. Those travelling alone found Pretoria's culture to be similar to Cape Town (p-level=0.0135), in comparison to those travelling with their partner who found cultural attributes to be worse than Cape Town. In terms of significant associations between age and nightlife and entertainment, younger respondents (18-23 years old) in comparison to older respondents (36-41 years old; p-level=0.0308) & (42-47 years old; p-level=0.0119) rated Pretoria as having better nightlife and entertainment compared to Cape Town. The impact of culture was significant on Germans and Canadians (p-level=0.0337), where the former rated cultural attributes of Pretoria as worse than Cape Town, while the latter rated the same attribute as similar to Cape Town. Likewise, Norwegian tourists rated nightlife and entertainment as better than Cape Town, in comparison to Dutch tourists who rated the same attribute as worse than Cape Town (p-level=0.0295).

Discussion and conclusion

A number of implications for destination marketing, city competitiveness, and destination management can be drawn from the findings above. Firstly, cognitive attributes to be emphasised in marketing campaigns need to vary from city to city. At a minimum, selecting images to position Cape Town will require destination marketers to capture a sense of the city product that differentiate attributes such as accommodation, service level, transport and infrastructure that are currently perceived as similar to Durban, Johannesburg and Pretoria. Destination management and quality of life improvement strategies must be integrated to shape the future infrastructural development of the city. A strategy of service excellence through training and development of staff in the hospitality industry will enable attributes such as service levels and variety of accommodation to be perceived differently. The transport issue should be addressed in the medium term to be used as an attribute for competitive positioning. Differentiated features of the city must substantiate its brand personality that was developed in the year 2004. Attributes such as variety of activities, attractions and scenery, and to some extent safety are perceived more positively in comparison to other cities. These must be emphasised with more clarity and consistency in destination promotion campaigns.

Also, competitive advantage stems from differentiation achieved by various elements of the destination offering, through multiple linkages of various attributes and benefits in a complex and unique way that makes it difficult for competitors to copy (Ritchie & Crouch, 2000). The ambience/atmosphere of a destination is very often key to competitive advantage because many destinations compete on value-for-money, cultural diversity and good amenities. A destination having a different and unique 'vibe' or 'feel' make it difficult for competitors to imitate due to the advantage stemming from various factors uniquely combined to leave a lasting impression on the visitor. The findings clearly show weaker associations between cities and attributes such as friendly people, nightlife and entertainment, and culture, which form the basis for the creation of a unique ambience. These attributes can be used more effectively to position Cape Town as the city with a different vibe. Cooperation of distribution channel members will be critical for success. Increasingly 'distribution channels are supporting and enabling product differentiation by adding value on the product and by contributing to the total brand experience and projecting powerful images' (Buhalis, 2000, p. 111). The choice of images used by travel agents and tour operators to market the destination should be guided by DMOs. The aim being that the brand images should suggest quality so that brand recognition can simplify choice and reduce risk.

For DMOs, the goal of destination differentiation is the establishment of point-of-difference associations. These associations are unique to the brand and are also strongly held and favourably evaluated by potential visitors. They can be attributes or benefits or attitudes towards the brand. 'The more abstract and the higher the level of association, the more likely it is to be a sustained source of competitive advantage. These potential differences should be judged on the basis of desirability and deliverability. With this approach, 'the emphasis in designing ads is placed on communicating a distinctive, unique product benefit and not on the creative' (Keller, 1998, p. 116). A point of difference association for Cape Town is its natural beauty and variety of activities, yet such an image perception is a 'selected impression' closely tied to visitors' own personal interests. As Ahmed (1991b) suggested, it is not objective facts but what visitors think or feel subjectively about a destination, its touristic resources and services, hospitality of its hosts, social cultural norms, and its rules and regulations, which affect consumer behaviour. Thus, all these factors have to be managed concurrently to create a clear brand image that inspire trust and confidence. The safety issue in particular is of concern for all four cities. Though, Cape Town was rated slightly better on this attribute, the fact that there are safety concerns, limit travelling of visitors to other cities, reducing spread of the economic benefits of tourism to other regions.

Another interesting finding is that indeed visitors respond to various components of a destination's image differently, and different people respond to different components. Demographic and travelling variables such as age, gender, income, country of origin, travel arrangements, and length of stay can form the basis of market segmentation strategies for Cape Town. According to the findings, image attributes can be used selectively for each target market. Younger visitors, for example, seem to attach more importance to variety of nightlife and entertainment, friendly people, and variety of accommodation in city choice compared to older respondents. These associations are not necessarily unique but in fact are shared with other city brands. These young visitors view them as being necessary to be a legitimate and credible product offering. These associations represent necessary but not sufficient conditions for brand choice. They have to be supplemented by other strengths such as accessibility, safety, and value for money. Point-of-parity associations also pertain to associations that are designed to negate other destinations' point-of-difference. In other words, if a brand can 'break-even' in those areas where its competitors are trying to find an advantage and can achieve advantages in some other areas, then the brand must be in a strong competitive position. 'Often the key to positioning is to achieve competitive points of parity with other destinations' (Keller, 1998, p. 117). The findings suggest that attributes such as accommodation, infrastructure, and service level are point of parity associations for brand Cape Town. Point of differences can be built using destination specific icons (Nickerson & Moisey, 1999). In the case of Cape Town, various attractions such as Table Mountain, Robben Island, and cultural attractions such as Bo-Kaap can be used to build point of difference associations.

Also, as brand Cape Town develops a presence and position in its target markets, it needs to continually extend itself to build on its core personality because as consumers become more familiar with a brand, they seek more detailed knowledge. Consequently brand Cape Town needs to become more complex and multi-layered to maintain its consumer appeal over time. Additional differentiation attributes can be created, but effective positioning requires focus on a small number of attributes and consistently iterating them (Botha et al., 1999). Consistency in marketing is even more crucial for points of parity and differences to be firmly established in the minds of consumers. Consistency does not mean that marketers should avoid making any changes in the

marketing program. On the contrary, the opposite can be quite true, being consistent in managing brand equity may require numerous tactical shifts and changes in order to maintain the strategic thrust and direction of the brand. The strategic positioning of many leading brands has remained remarkably consistent over time. 'A contributing factor to their success is that despite these tactical changes, certain key elements of the marketing program are always retained and continuity has been preserved in brand meaning over time' (Keller, 1998, p. 505). Otherwise a fuzzy and confused brand image is created in the market place.

In addition, the city's tourism competitiveness seems to stem from a combination of attributes, which contributes to the marketing challenge faced by DMOs. Positioning such a multi attributed destination in dynamic and heterogeneous markets requires the implementation of four distinct strategies for effective place improvement and marketing (Kotler, Asplund, Heider & Rein, 1999). These four strategies are: design of the place (architecture, city planning), infrastructure (transport, accessibility), basic services, and attractions (entertainment and recreation facilities). These attributes have been measured in the study, and clearly there is room for improvements for Cape Town, and other cities. In fact, city marketing can be enhanced by re-imagining localities through specific policies such as organising mega events, large-scale physical re-development, advertising and promotion (Kavaratzis, 2004). These strategies are being employed by Cape Town, for example, the international convention centre was completed in the year 2004, and the city waterfront is having a face-lift. In the words of many authors (Ashworth & Voogd, 1999; Botha et al., 1999; Hankinson, 2004; Pike & Ryan, 2004), the city must satisfy functional, symbolic and emotional needs of visitors, and the attributes that satisfy those needs, must be orchestrated into the city's value proposition.

Furthermore, affective associations can be used for positioning the city product. The learning of associations between specific affective concepts, for example, breath-taking scenery, too expensive etc. and a specific destination indicates how the destination is positioned in the consumer's mind. 'Positioning a destination may occur simultaneously with how it is associated because most individuals find it impossible to make category judgements without also making evaluation judgements' (Woodside & Lysonski, 1989, p. 8). Travellers construct their preferences for alternatives from destination awareness and affective associations. Research by Madrigal & Khale (1994) reveals the importance of personal values in the destination selection process. The data in their research indicates that although demographic differences existed across segments, personal value systems were better predictors of activity preferences. They observe that this information could be used to position a destination in the market place. Promotional themes could connect a destination's activities and attractions with personal values relevant to specific target markets.

Affective components of destination image were not measured in this study, which is a limitation that can be addressed for future research on city destinations. The other limitations of the study are: regardless of the systematic procedure used, researchers could not always capture every second person with the 'next to pass' approach, due to uncontrollable factors. As a result, data collection did not follow a perfect probability sample and the sample size is relatively small. Respondents' views would only be those of a particular set of tourists and not representative of year round tourism. Since they were all interviewed in Cape Town, it is likely that they were more knowledgeable and favourably disposed toward Cape Town compared to the other cities. Hence, a word of caution needs to be expressed for generalisability of findings.

In conclusion, destinations must skilfully position themselves to the various publics they want to target. They must adapt their messages to highly differentiated buyers while at the same time developing a core image of what the place basically offers. The place must develop a concept infusing energy, direction, and pride into the place's citizens. It must be a concept that is true of the place, where the conveyed image is congruent to reality (Kotler et al., 1993). The positioning must be delivered consistently over time and geographic spread, with specific executions and elements working in synergy to provide competitive advantage for city products. The positioning statement embodies the concept or essence of destination, which is conveyed through marketing and communication activities. It explicitly considers how the city destination will satisfy a consumer need and different consumer meanings can be assigned to the same place via different images. In this way a place can be positioned differently to simultaneously appeal to different market segments and it can subsequently be repositioned for the same or a different audience in the later phases of its destination life cycle. It seems from the study that building blocks are already in place for a creation of a powerful city brand that not only reflects reality, but is future orientated and provide a clear and inspiring strategic vision of what Cape Town should stand for in the long term for visitors. However, the city positioning can be further fine tuned, to increase its appeal towards customers and improve its competitive advantage vis-à-vis Johannesburg, Durban and Pretoria.

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