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There is nothing so practical as good theory for tracking destination image over time

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DESTINATION IMAGE OVER TIME

ABSTRACT

Destination image has consistently been a popular theme in the tourism literature. This is due to the important role the construct can play in the intangible nature of consumers' travel decisions. However, one temporal aspect, of how destination image might change over time, has attracted little academic research attention. This manuscript attempts to make a contribution to this gap in the literature by reporting key findings from an investigation into perceptions held of one of New Zealand's most popular resort destinations, Rotorua, at three points in time over two decades. The research is narrowly focused on the perceptions of consumers in Rotorua's largest domestic market, Auckland, and for a specific travel situation, which is short break holidays by car. The research design is based on Fishbein's multi-attribute theory and Kelly's personal construct theory. The key finding was minimal changes in Rotorua's perceived strengths and weaknesses, relative to four competing destinations, in the target market, over the 20 year time period. We propose the theoretical foundations of the research design, and the efficacy of the data analysis, provide DMOs with a valid and reliable means to monitor the strengths and weaknesses of their destination over time.

1. INTRODUCTION

This manuscript aims to contribute to an enhanced understanding of the temporal aspect of destination image, a phenomenon that has attracted relatively little academic research attention (see Fyall, Garrod & Wang, 2012). We present a practical method for destination marketing organisations (DMO) to track market perceptions of their destination over time. Furthermore, the graphical output of the data can be readily understood by stakeholders, such as small business operators, who have no statistics training. The graphical nature of Importance-performance analysis (IPA) is effective for enhancing understanding of the rationale for proposed future marketing communications, as well as assessing the effectiveness of previous promotions. The method we present is underpinned by two established theories from the psychology literature; multi-attribute theory and personal construct theory. The manuscript therefore follows Lewin's maxim, which is: 'there is nothing so practical as a good theory' (Lewin, 1943, p. 118). Lewin attributed this observation to an unnamed 'business man', to highlight the need to bridge the divide between academics and practitioners. Such a divide between tourism researchers and destination marketers has been regularly voiced (see for example, Jafari 1984, 1993, Jenkins 1999, Pike & Schultz 2009, Riley & Palmer 1975, Ryan 2002, Selby & Morgan 1996, Taylor, Rogers & Stanton 1994).

The manuscript begins with a brief history of the tourism development of the destination of interest, Rotorua, which is one of New Zealand's most popular resort areas. This discussion outlines the rise and fall, and rise again, of Rotorua's destination image, which is the construct of interest in the study, to argue the case for more research into the temporality of perceptions towards destinations over time. The paper then outlines the methodology used to measure the image of Rotorua in Auckland, which is the destination's most important market, at three points in time over 20 years. The mixed methods research design is underpinned by Fishbein's (1963, 1967) multi-attribute theory and Kelly's (1955) personal construct theory. The findings use Importance-performance analysis and gap analysis to visually highlight Rotorua's strengths and weaknesses for a specific travel context, which is short break holidays by car. It is suggested the theoretical foundations and research design provide destination marketing researchers in other parts of the world with a valid and reliable approach to monitoring destination image over time. Even though the topic of destination image is one of the most popular in the tourism literature, there have been few studies published with an interest in this aspect of temporality. This is surprising given the important

role played by destination image in the intangible nature of consumers' destination decision making.

The history of the development of the resort destination of Rotorua in New Zealand, provides valuable insights into the fluctuations of destination image. The story of Rotorua tourism (see for example Ateljevic & Doorne 2000, Horn Fairweather & Simmons 2000, Pike, May & Bolton 2011, Stafford 1986, 1988) is of relevance for DMOs and stakeholders in other parts of the world; as an example of how destination image can rise and fall and rise again. This is a destination that benefitted immensely from preferential treatment and investment by the New Zealand government, and as a result enjoyed the status of the country's top destination for the first half of the 20th century. The government's preference for Rotorua to be the country's tourism flagship resort area was made on the basis of the district's extensive geothermal reserves, combined with natural landscape of forests and lakes (Stafford 1977, Steele 1980). The Government's aim was to develop Rotorua as 'a hot water mineral spa on much the same lines as the famous European and English spas such as Vichy, Carlsbad, Bath and Harrogate' (Savage, 1980, p. 5).

What emerged was a relatively rare example of a true destination *management* organisation, which had direct control over the district's resources and development. Typically, DMOs are *marketing* organisations, with direct control only over promotion in the traditional marketing mix (Pike & Page, 2014). Most DMOs do not have *management* control over other marketing functions such as product development, pricing and distribution. The establishment of the New Zealand Department of Tourist and Health Resorts in 1901 was the first of its kind in the world (Steele, 1980). The department would manage the development, promotion and sales distribution of the Rotorua township, and tourism offerings, into the latter half of the 20th century. It was claimed Rotorua was the only town in the British Empire to have been completely controlled by a central government (Braynart Group, 1980). Rotorua did not have an independent council, devoid of government representatives, until 1950 (Stafford 1988, Tapsell 1972). As well as the development of a flagship sanatorium bath house, the government assumed wide-ranging responsibilities in Rotorua, including: airports, roadworks, drainage, water supply, roads, parks and gardens, railways, bus services, hotel and other spa development, electricity provision, visitor information, lake launches, and thermal attractions such as Whakarewarewa and Waimangu Valley. The first domestic Government Tourist Bureau was opened by the department in Rotorua, in 1911, which the

government would operate as Rotorua's main visitor information office until 1990. A primary role of the department's overseas bureaux during this time was to promote Rotorua.

However, when the New Zealand government gradually withdrew financial and managerial support for Rotorua tourism from the 1950s, the local council and stakeholders failed to maintain the destination's built resources, which combined with a lack of investment in destination promotion, led to drastic slide in reputation from the 1960s onwards (Stafford, 1988). The over-reliance on the New Zealand government by Rotorua tourism stakeholders over 50 years, would lead to a gradual but spectacular decline in image, which would take decades to turnaround. This is perhaps best encapsulated in a 1986 article in Wellington's *Dominion* newspaper, headlined 'Death of a tourist town', and the state of denial in the city, as evident in the then Rotorua Mayor's retort about this article: 'It is in the interests of other centres to carry out a vendetta against Rotorua to put tourist off coming here' (Rotorua Daily Post, August 13th,1986, p. 1). As well as negative national and international headlines at this time Rotorua also had the third highest level of unemployment in New Zealand, and a high ratio of vacant shops in the central business district (Stafford, 1988).

It would eventually take the resignation of the poorly funded Rotorua Promotion Society in 1988 to stir the local government into remedial action to revitalise Rotorua's image. As observed by Hall (1999), the need for coordination is felt most when there is a lack of it. Until 1988, Rotorua had not had a local DMO. The attempt to turnaround Rotorua's negative image began that year with a short term $43,425 advertising campaign in the Auckland market (Rotorua District Council, 1988) and the 1989 recruitment of the lead author in this study, as a full time staff member with an initial annual budget of $250,000 to establish Tourism Rotorua, the city's first regional tourism organisation (RTO). One of the to key objectives at this time was to coordinate long-term promotions to reactivate interest in Rotorua as a holiday destination for New Zealanders, by changing the negative perceptions and attitudes towards Rotorua.

Rotorua has benefitted from its central North Island location, 240 kilometres south of Auckland, New Zealand's most populated city. From downtown Auckland, Rotorua is a comfortable three hour drive, and while not suited to day trips, is ideal for short breaks and family holidays. Auckland has consistently been Rotorua's largest source of visitors for over a century, and remains a key focus of the RTO's promotional initiatives.

In late April 2000, a survey was undertaken to measure Rotorua's image in the Auckland market, after 10 years of activity by the new RTO and major civic-sponsored infrastructure redevelopments. The results of this survey provided benchmark perceptions of Rotorua in this market, relative to four key rival destinations (see Pike & Ryan, 2004). In an effort to monitor perceptions over time, the survey was repeated in early May 2014 (see Gentle, Pike, Kelly & Beatson, 2016), and again in April 2019, using the same questionnaire items to measure destination image. The research design is grounded in Fishbien's (1963, 1967) multi-attribute theory and Kelly's (1955) personal construct theory.

The purpose of this manuscript is to report the 2019 findings, in comparison to the two previous surveys. The 2014 and 2019 repeat surveys were underpinned by the proposition that positive destination change takes places only slowly over time (see Gartner, 1986). Also, it has been suggested destination image attribute importance might vary across different travel contexts (Barich & Kotler 1991, Crompton 1992). However, most destination image studies have not reported a given travel situation (see Pike 2002, 2007). It is argued that due to the important role played by destination image in tourism consumer decision making, this paper provides a contribution to the paucity of research related to one of the key temporal aspects of the construct. The travel situation made explicit to participants in each survey was a short break holiday by car, defined as a non-business trip of one to four nights away.

2. LITERATURE REVIEW

Destination marketing has emerged as a central pillar of tourism research (Fyall, Garrod & Wang, 2012). Key to this strong interest by researchers is the understanding that most tourism activities take place at destinations (see Leiper, 1979). There has been an explosion in the number of destinations available to consumers (Gunn, 1988), and so in competitive markets a destination's image is as important as the tangible features (Hunt, 1975). Destination image has therefore been one of the most popular constructs to attract research attention in the destination marketing literature (Pike & Page, 2014), due to the role the construct can have in the intangible nature of consumer decisions in travel planning (Fakeye & Crompton, 1991). It has also been proposed the biggest brands in the travel industry are destinations (Morgan, Pritchard & Pride, 2002), and in the relatively recent modelling of the measurement of destination brand performance, a core latent variable is destination image, also referred to as

brand associations (see for example see Boo, Busser & Baloglu 2009, Chen & Myagmarsuren 2010, Gartner & Konecnik Ruzzier 2011, Im, Kim, Elliot & Han 2012, Kim, Han, Holland & Byron 2009, Kotsi, Pike & Gottlieb 2018, Tasci, 2018).

Conceptually, a widely cited definition of destination image is 'the sum of beliefs, ideas, and impressions that a person has of a destination' (Crompton, 1979, p.18). However, reviews of the destination image literature (see Chon 1990, Gallarza et. al. 2002, Josiassen, Assaf, Wook & Kock 2015, Pike 2002, 2007, Stepchenkova and Mills 2010, Tasci, Gartner and Cavusgil 2007, Zhang, Fu, Cai and Lu 2014) have not identified an accepted scale index to measure the construct. A practical option for conceptualising destination image, which guided the development of the questionnaire design in this project is to consider what makes a destination attractive to consumers. Following Fishbein's (1963, 1967) multi-attribute model, Goodrich (1978) and Mayo and Jarvis (1981) conceptualised an attractive destination as one that is perceived to provide what is important to the consumer. In other words the entity is perceived favourably on attributes that determine destination choice. Operationalising Fishbein's multi-attribute model requires an understanding of the range of destination attributes deemed salient to consumers for a particular travel situation. Once the range of attributes has been identified, Importance-performance Analysis (IPA) can be used to measure attribute importance and then perceived performance across the same set of attributes (Martilla & James, 1977).

Figure 1 shows the IPA Matrix format developed by Martilla and James (1977), where each attribute importance mean is plotted on the y-axis and each destination perceived performance mean is plotted on the x-axis. The two means for each attribute appear in one of four quadrants. Attributes plotted in Quadrant 1 rate relatively high in importance but the perceived performance is relatively low. Hence Martilla and James labelled this quadrant 'Concentrate here' since initiatives are needed to improve perceived performance. Chon, Weaver and Kim (1991) termed these attributes 'missed opportunities'. Attributes in Quadrant 2 are rated relatively more important and perceived performance is relatively high. The label 'Keep it up' refers to the need to keep reinforcing the perceived high performance. Chon, Weaver and Kim (1991) termed these attributes as 'strengths'. It is recommended promotional communications focus on these attributes, since it is a marketing axiom that it is easier to reinforce positively held perceptions than attempt to change consumers' minds. In Quadrant 3 attributes are less important and perceived performance is relatively low. The

quadrant is labelled 'Low priority' to indicate less attention should be given to these attributes in marketing communications. Chon, Weaver and Kim (1991) labelled these attributes as 'wasted effort'. Attributes in Quadrant 4 are rated relatively low in both importance and performance. The label 'Possible overkill' is used to recommend not focusing resources on promoting these attributes. Chon, Weaver and Kim (1991) labelled these attributes as wasted effort. However, Yu and Weiler (2000) suggested this might be a case of unappreciated performance, and so initiatives could be considered to attempt to lift the level of importance.

From the 2000 survey data, the suitability of IPA matrix for generating discussion on practical implications, was tested in meetings with the DMOs in each of the five destinations. Participants in these meetings were a mix of board directors and senior management. At each of these meetings, in which none of the participants had undertaken statistics training, the key points made in the graphical output were quickly grasped. Key feedback from these practitioners highlighted the suitability of the IPA method for monitoring destination image over different points in time (reference withheld for review purposes).

Figure 1 - IPA matrix
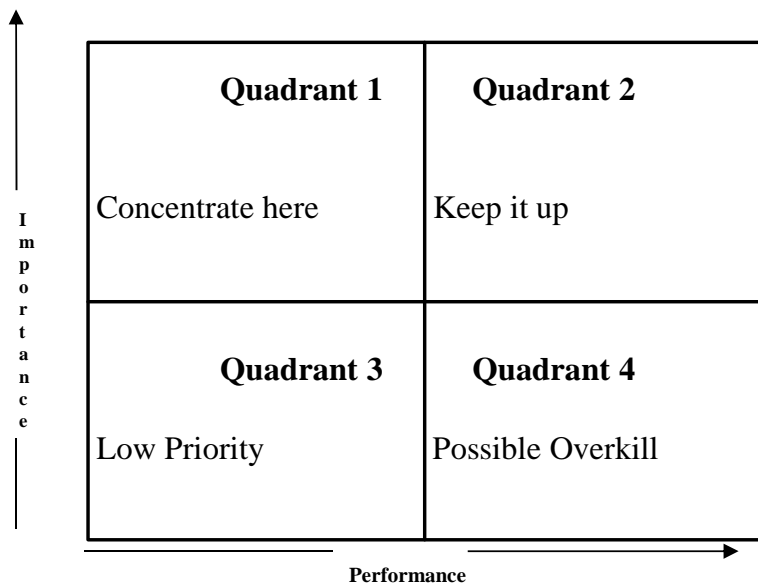
Source: Adapted from Martilla and James (1977)

Temporality of destination image

Relative to the hundreds of studies published in the destination image literature, there has been little attention towards one of the key aspects temporality. Gallarza, Saura, & Garcia (2002) found three streams of research into destination image over time: the influence of length of stay, the effects of previous visitation, and studies that take repeat measure of perceptions of the same destination over time. Regarding the latter, which is the focus of this project, the first published study was by Gartner (1986) who found almost no change in the images held of the states of Colorado, Montana, Utah and Wyoming over a three month period in 1982. Gartner and Hunt (1987) reported positive destination image change for the state of Utah over a period of 12 years from 1971 to 1983, but concluded positive image change takes place only slowly over time. Gartner (1993) added the proposition that the larger the entity the slower the rate of positive change. In the UK, a three year analysis of the effectiveness of a campaign to improve perceptions of Northern England in the London market identified minimal image change (English Tourism Board, in Jeffries 2002). More recently in Australia a study of five Queensland destinations found almost no change in perceptions in the Brisbane market over a 12 year period between 2003 and 2015 (Pike, Gentle, Kelly & Beatson, 2016).

The influence of travel context on destination image

The influence of the travel situation on destination image has not been explicit in many studies (Pike & Page 2014, Ritchie 1996, Snepenger & Milner 1990), even though one of the first published studies in the field (see Gearing, Swart and Var, 1974) discussed the importance of identifying attributes of importance for a given travel situation. For example, the attractiveness of a destination might vary for the same individual between an annual family holiday and an impromptu short break. Of the 262 destination image papers tabled by Pike (2002, 2007) only 37 discussed a specific travel situation. The travel situation of interest in this project is short break holidays by car, defined in the 2000 study as a trip away from home of one to three nights (Pike, 2002b). The target market of interest is Auckland, which is New Zealand's most populated city and Rotorua's largest source of visitors. In the 2017-18 financial year, just over half of visitor expenditure in Rotorua was by domestic visitors.

Auckland remains the key target in domestic marketing (see Rotorua Economic Development, 2018).

The aim of this study was to identify any changes over time in the perceived strengths and weaknesses of Rotorua as a short break holiday destination for consumers in the Auckland market. This requires an understanding of how Rotorua is perceived in comparison to the key competing destinations in this target market and travel situation. The four rival places in this project, within a reasonable driving distance for a short break from Auckland are the Bay of Islands, Coromandel, Lake Taupo and Mount Maunganui. In the original 2000 study, mean maximum comfortable driving time to a short break destination was 3.8 hours. Unaided destination preference questions identified the five destinations as the most salient when considering a short break by car.

3. METHODS

A rigorous research process involving five stages was undertaken to design the questionnaire initiated in April 2000. First, a series of personal interviews was held with Auckland consumers (N = 25) to identify destination attributes deemed salient, the necessary first stage in operationalising Fishbein's multi-attribute theory, in the context of a short break holiday by car. The Repertory Test was used, the technique designed to operationalise Personal Construct Theory (see Kelly, 1955). Personal construct theory posits individuals are quasi-scientists who go through life making predictions on the outcomes of alternative choices. These potential outcomes are in the form of a repertoire of personal constructs. While each individual has a unique set of personal constructs that guide their behaviour, Kelly postulated there would be a commonality shared across a group in a sample. The Repertory Tests resulted in the identification of 17 common attribute themes, which were verified by two co-researchers. Second, to investigate the supply-side perspective of attribute importance, a series of personal interviews was held with tourism practitioners (N = 11) in Rotorua, Tauranga, Coromandel, Taupo and the Bay of Islands. This resulted in identification of 15 attribute themes. The third method was a review of published studies of destination image in the literature (N = 84). Over 100 attribute labels were identified, which were synthesised into 20 themes. Crompton, Fakeye and Lue (1992) suggested the value of early destination image studies was limited, due to the failure to recommend determinant attributes. Therefore, a further step was undertaken to analyse 39 of the 84 studies that had nominated determinant

attributes or factors. This resulted in the identification of 37 themes, which were then categorised into 15 attribute labels. Triangulation of the findings from these four stages resulted in a list of 18 attributes. These were supplemented by two further attributes, which while they did not feature strongly in the previous stages, were key themes consistently used in the history of domestic promotions of Rotorua: 'Hot pool bathing' and 'Maori culture'. A final list of 20 attributes, as shown in Table 2, was used in the 2000 questionnaire. However, one item, 'Snow sports' was removed from the 2014 and 2019 questionnaires, since Rotorua and three of the other destinations are not located close to ski fields.

The questionnaire used in 2019 consisted of four sections. Without mentioning the names of any destination to participants, the first page asked them to indicate the likelihood of taking a short break holiday by car in the next 12 months, and to list which destinations they would probably consider. The next section contained the 19 destination image attributes, and still without mentioning any destination names, participants were asked to rate the importance of each. A seven point Likert-type scale was used, anchored at 'Of no importance' (1) and 'Very important' (7). The next section asked participants to rate the performance of Rotorua, Bay of Islands, Lake Taupo, Coromandel and Mount Maunganui, on the same 19 destination image attributes. A seven point scale was used, anchored at 'Very strongly disagree' (1) and 'Very strongly agree' (7). Rotorua's four main competing places in the Auckland market were included to enable a comparison of strengths and weaknesses. Participants were also asked to indicate the likelihood of visiting each destination in the next 12 months, as well as the likelihood they would recommend each destination to other people. For both questions a seven point scale was used, anchored at 'Definitely not' (1) and 'Definitely' (7). The final section contain demographic questions.

The 2000, 2014 and 2019 surveys were conducted during the same autumn season, although a different method was used to enlist a new sample of participants each time. In April 2000 a paper-based questionnaire was mailed to 3,000 households, selected using a systematic random sampling from the 300,000 listings in the Auckland telephone directory. An incentive prize draw of short break holiday accommodation was offered. A total of 763 useable questionnaires were returned. In May 2014, an online survey was developed using KeySurvey software, with the URL distributed to Auckland members of the panel of a commercial marketing research company. This resulted in 441 useable responses. In April 2019 an online survey was developed using Qualtrics software and the URL distributed to

Auckland members of the panel of a different commercial marketing research firm. The destination image attributes were presented to each participant in a randomised order. Qualtrics assigned a project manager to monitor responses and remove any misinformed responses such as extremity bias. This resulted in 294 useable responses.

4. RESULTS AND DISCUSSION

In this project we have maintained a focus on 1) replicating measures of destination image, 2) of a competitive set of places, 3) at three points in time over two decades, 4) in one specific travel context, which is a short break holiday by car, 5) in one important domestic market. The 2000, 2014 and 2019 samples are summarised in Table 1. The characteristics of the three samples were generally similar, and representative of the wider Auckland census population. The most notable difference with the 2019 sample was the relatively high level of younger participants aged 18-34 and lower level of those aged 50 and over. In 2019 the mean likelihood of taking a short break holiday by car within the next 12 months was 5.4, in comparison to 5.8 in 2000 and 4.9 in 2014. Rotorua had the highest level of previous visitation at 85.4%, followed by Taupo (76.9%), Mount Maunganui (69.4%), Bay of Islands (64.6%) and Coromandel (63.3%).

Table 2 lists the means in 2019 for the attribute importance items from the three samples, in rank order. There were only minor differences in the ranking of the attributes over the time period, with the exception of 'Comfortable drive from home'. The Cronbach alpha for the 19 items was .86, compared to .83 in 2000 and .90 in 2014. This indicates good internal consistency over time. The grand mean importance for the 19 attributes was 4.77, compared to 4.2 in 2014 and 4.4 in 2000. It is noticeable that the rank order of the importance of each attribute was also generally consistent over time. This provides support for the rigorous methods used in the original study to identify salient attributes in the travel context, particularly given the consistency of these results is across different samples of the population as well as across different points in time. One important practical implication of the 2000 attribute importance data was highlighted in each of the five meetings with the RTO representatives. At each meeting there was initial surprise at the importance of suitable accommodation. From the supply perspective there were strong feelings that the most important attributes should be related to the strengths of a destination, such as beaches or other attractions. However, there became recognition that for this travel context, a short break

by car, accommodation would for most people be the largest cost item. Given, value for money was the other most important attribute, this stimulated discussion around whether accommodation and/or packages should feature more strongly in promotions to this market segment. This finding is similar to a previous application of IPA by Hudson and Shephard (1998), which in the context of snow skiing holiday found the most important attribute was availability of hot water, and not a feature of the destination. These findings go some way to support the proposition by the English Tourist Board (cited by Alford, 1998) that a good package deal could be more influential than features of the actual destination; since many decisions are based on the type of holiday first and then the destination selection. Given destinations can be substitutable for a given travel situation where a competitive set of places offer similar features or benefits (Cohen 1972, p. 172, Gilbert 1990, Phelps 1986), it might be advisable for DMOs to feature determinant attributes for a travel situation in marketing communications. In this case, where awareness of the five nearby destinations by Auckland residents is high, as evidenced by previous visitation levels, there should be an emphasis on accommodation deals by the RTOs.

Table 1 –Characteristics of the participants

		2019 N	2019 Valid %	2014 N	2014 Valid %	2000 N	2000 Valid %
Gender	Male	145	49.3%	227	51.5%	350	45.9%
	Female	149	50.7%	214	48.5%	413	54.1%
	Total	294		441		763	
Age	18-25	59	20.1%	31	7.0%	25	3.3%
	26-34	87	29.6%	54	12.2%	118	15.5%
	35-49	72	24.5%	132	29.9%	297	38.9%
	50-64	45	15.3%	137	31.1%	233	30.5%
	65+	31	10.5%	87	19.7%	90	11.8%
	Total	294		441		763	
Marital status	Single	87	29.6%	111	25.2%	88	11.7%
	Married/De facto	176	60.3%	262	59.4%	583	77.1%
	Separated/divorced/separated	29	9.9%	68	15.4%	85	11.2%
	Total	292		441		756	
	Missing	2		0		7	
Dependent children	0	159	54.5%	305	68.3%	425	55.8%
	1-2	111	38.0%	125	28.3%	260	34.2%
	3+	22	7.5%	15	3.4%	76	10.0%
	Total	292		441		761	
	Missing	2		0		2	
Income	< NZ$49,000	102	38.8%	165	37.4%	280	39.3%
	$49,001-$65,000	40	15.2%	68	15.4%	120	16.9%
	$65,001-$80,000	40	15.2%	49	11.1%	76	10.7%
	$80,000-$100,000	36	13.7%	64	14.5%	104	14.6%
	> $100,000	45	17.1%	95	21.5%	131	18.4%
	Total	263		441		711	
	Prefer not to say			0		52	
Education	High school	71	24.1%	151	34.3%	279	36.8%
	Polytechnic	48	16.3%	90	20.4%	156	20.6%
	University graduate	85	28.9%	85	19.3%	105	13.8%
	Professional qualification	43	14.6%	48	10.9%	152	20.0%
	Post-graduate	47	16.0%	67	15.2%	67	8.8%
	Total	294		441		759	
	Missing	0		0		4	

Table 2 - Attribute importance means

Attribute	2019 Rank	Mean	Std.	2014 Rank	Mean	Std.	2000 Rank	Mean	Std.
Good value for money	1	5.95	1.15	1	5.60	1.34	1=	5.99	1.29
Suitable accommodation	2	5.91	1.25	2	5.42	1.35	1=	5.99	1.19
Natural scenic beauty	3	5.52	1.24	4	5.02	1.36	4	5.37	1.40
Lots to see/do	4	5.47	1.39	5	4.90	1.44	7	4.85	1.51
Good weather	5	5.46	1.49	3	5.22	1.37	6	5.07	1.49
Good cafes/restaurants	6	5.45	1.40	6	4.78	1.56	5	5.20	1.62
Friendly locals	7	5.35	1.31	8	4.61	1.54	9	4.46	1.74
A comfortable drive from home	8	5.05	1.49	7	4.74	1.64	3	5.50	1.42
Good beaches	9	4.86	1.50	9	4.29	1.65	8	4.50	1.82
Not too touristy	10	4.80	1.50	10	4.23	1.57	11	4.34	1.76
Shopping	11	4.77	1.64	11	3.93	1.65	14	3.82	1.75
Places for swimming or boating	12	4.48	1.65	13	3.73	1.80	10	4.34	1.92
Adventure activities	13	4.47	1.64	15	3.57	1.69	16	3.56	1.73
Places for walking/tramping	14	4.45	1.67	14	3.72	1.70	13	4.11	1.86
Hot pool bathing	15	4.39	1.65	12	3.89	1.67	12	4.15	1.77
Close to other destinations	16	4.13	1.64	16	3.26	1.67	18	3.02	1.74
Maori culture experiences	17	3.62	1.84	19	2.69	1.66	20	2.41	1.63
Wineries	18	3.36	1.73	17	3.23	1.78	15	3.79	1.93
Fishing	19	3.13	1.95	18	2.88	1.87	17	3.23	2.11
Grand mean		**4.77**	**0.82**		**4.20**	**0.95**		**4.40**	**0.86**

The means for the perceived performance of Rotorua on the 19 items are listed in Table 3. As in Table 2, the attributes are listed in rank order of attribute importance. Rotorua was perceived to perform strongest of the five destinations for 11 attributes, compared to nine attributes in 2014 and eight attributes in 2000. The important implication here is that these attributes present the basis for identifying Rotorua's relative strengths. All but one of these 11 attributes, Maori culture, were rated above the scale mid-point. In terms of potential competitive weaknesses, Rotorua was perceived to perform the worst of the five destinations for five attributes, compared to five in 2014 and six in 2000. While the means have fluctuated

between the three samples, the Rotorua performance rankings have been very consistent over time.

Table 3 – Rotorua perceived performance means

	2019 Destination rank	Mean	2014 Destination Rank	Mean	2000 Destination Rank	Mean
Good value for money	1	5.04	1	4.70	1	5.03
Suitable accommodation	1	5.67	1	5.23	1	5.99
Natural scenic beauty	4	5.55	3	5.18	4	5.73
Lots to see/do	1	5.80	1	5.31	1	6.08
Good weather	4	5.02	4	4.46	5	4.45
Good cafes/restaurants	1	5.53	1	5.10	1	5.47
Friendly locals	1	5.21	5	4.60	4	4.34
A comfortable drive from home	1	5.16	1	4.73	2	5.56
Good beaches	5	3.46	5	3.01	5	1.63
Not too touristy	5	3.52	5	3.18	5	2.96
Shopping	2	4.81	2	4.49	2	4.62
Places for swimming or boating	5	4.51	5	4.09	5	4.43
Adventure activities	1	5.55	1	5.36	1	5.73
Places for walking/tramping	1	5.42	3	5.02	2	5.64
Hot pool bathing	1	5.86	1	5.70	1	6.54
Close to other holiday destinations	1	5.18	1	4.90	1	5.44
Maori culture experiences	1	5.63	1	5.61	1	6.37
Wineries	5	3.63	3	3.59	5	2.57
Fishing	5	4.09	5	4.21	5	4.71
Grand mean	**1**	**5.02**	**1**	**4.67**	**1**	**4.90**

Importance-performance analysis for Rotorua using the 2019 data is shown in Figure 2. The vertical access represents attribute importance, and the horizontal axis represents perceived Rotorua performance. Both axis gridlines have been set at the grand mean for attribute

importance (4.77). The two attributes in the top left quadrant are those that are relatively more important, but where Rotorua is perceived to perform below average. For both of these attributes Rotorua was ranked lowest of the five destinations, and so these represent competitive weaknesses: 'Good beaches', and 'Not too touristy'. The nine attributes in the top right quadrant are those that are relatively more important and where Rotorua is perceived to perform above average. Of these, Rotorua ranked highest for six attributes, and so these are representative of competitive strengths: 'Good value for money', 'Suitable accommodation', 'Lots to see and do', 'Good cafes/restaurants', 'Within a comfortable drive', and 'Friendly locals'. The practical implications of this are that future marketing communications should reinforce the positive perceptions of the six strengths, and attempt to improve perceptions held of the two weaknesses. As suggested, it might be pertinent to emphasis accommodation deals in particular in this travel context. The eight attributes in the two bottom quadrants are relatively less important. This includes two of Rotorua's strengths that have historically been a key focus in promotions: 'Maori culture' and 'Hot pool bathing'.
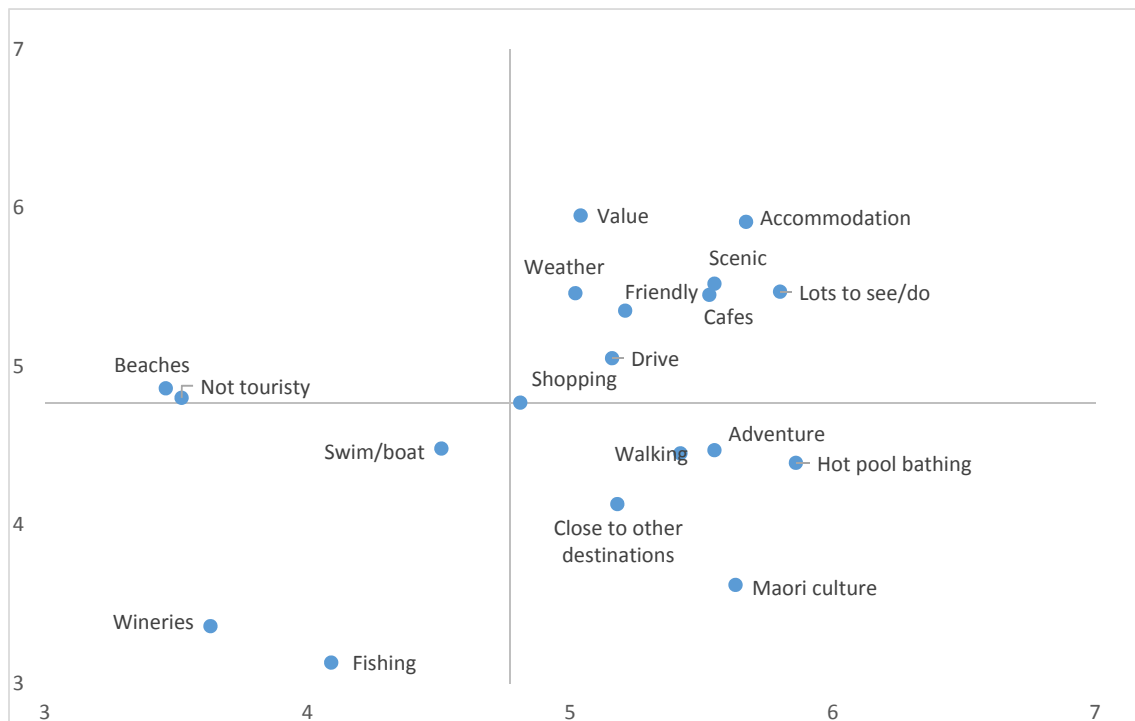
Figure 2 –Rotorua IPA 2019

Figures 3 shows the Rotorua IPA matrix from the 2014 data, while the 2000 data is shown in Figure 4. These figures visually highlight the general consistency of Rotorua's perceived strengths and weaknesses over the 20 year time period.
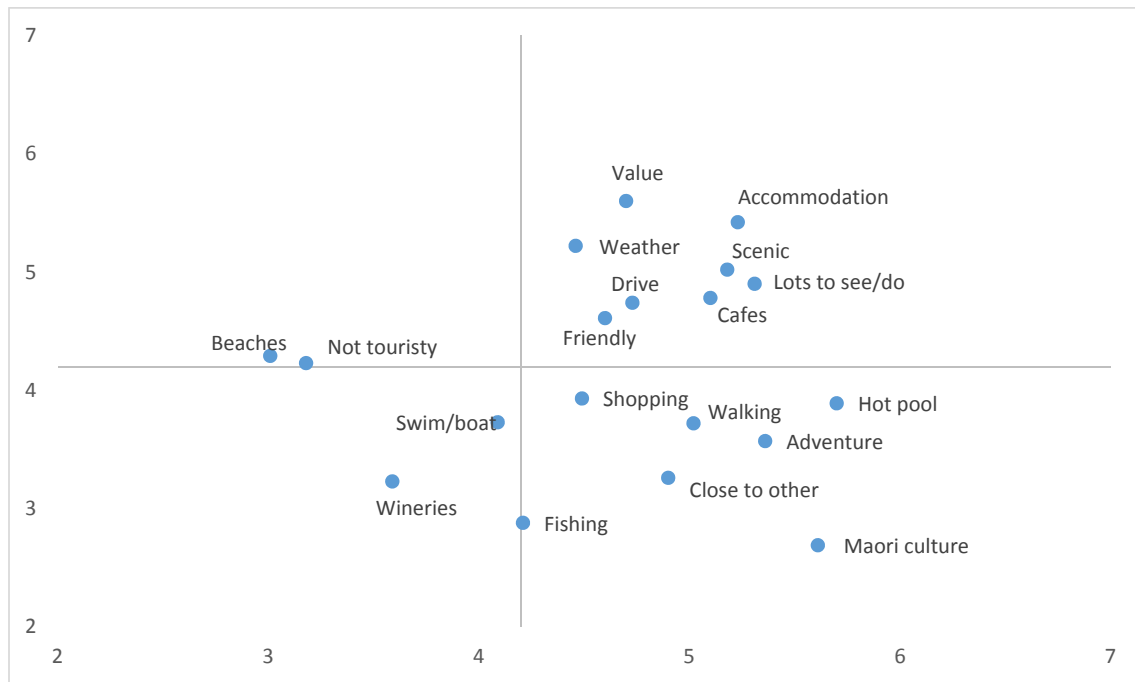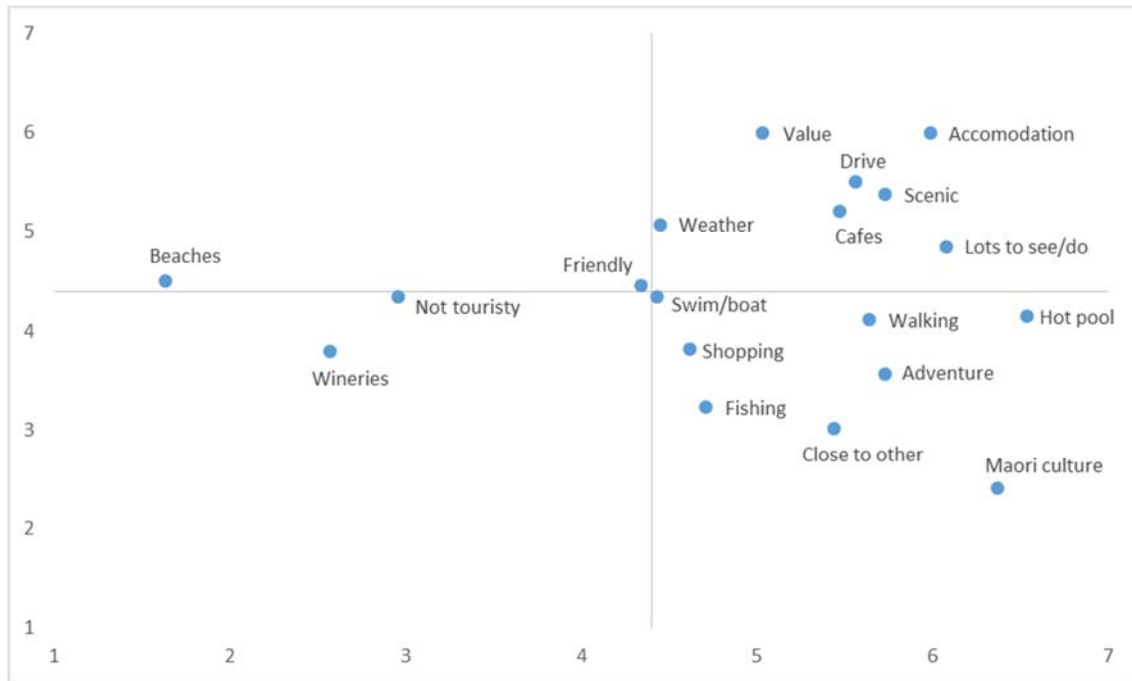
Figure 3 – Rotorua IPA 2014

Figure 4 – Rotorua IPA 2000

Another way to visually display the practical implications of the IPA data is in the form of gap analysis. Figures, 5, 6 and 7 show the gaps between attribute importance and perceived performance across the three samples. Again there is a general consistency of results over the 20 year period. The most notable implication, is that even though Rotorua has consistently rated the highest of the five destinations for value for money, which has consistently been the most important attribute, the perceived performance mean has been consistently lower.
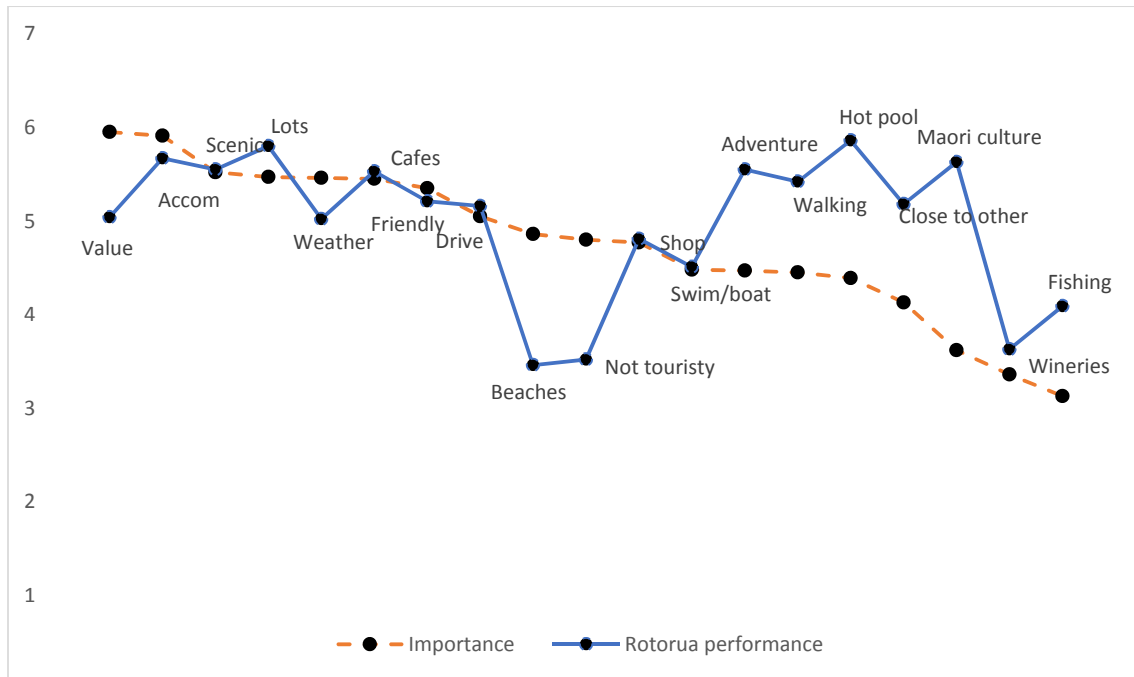
Figure 5 – Rotorua gap analysis 2019

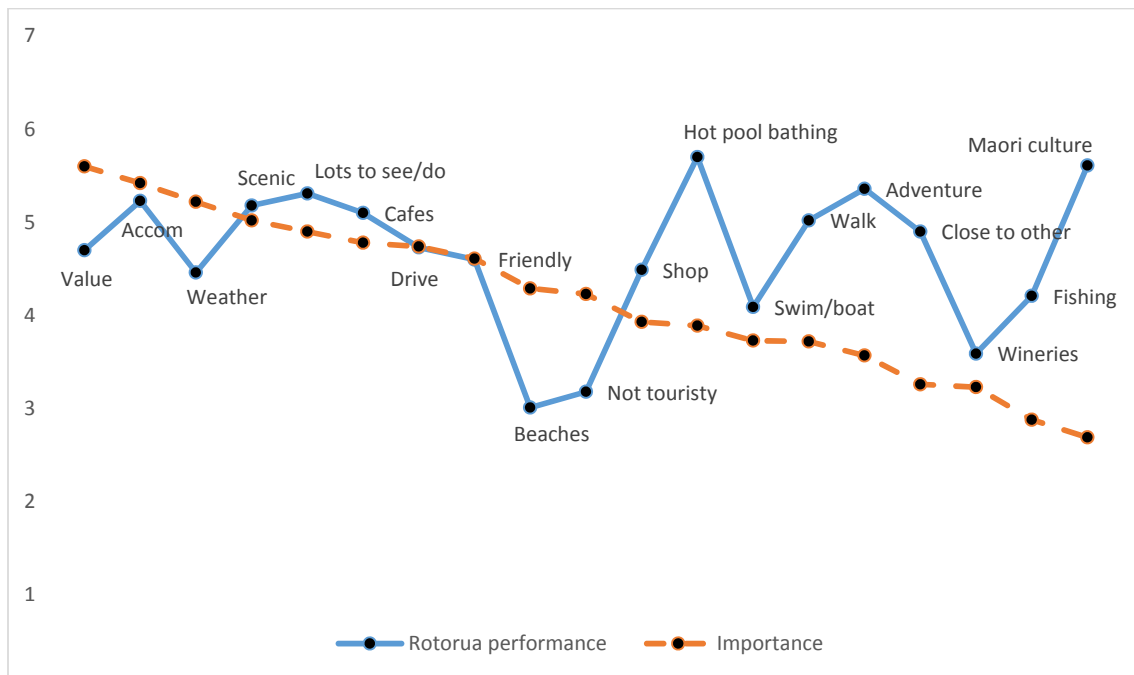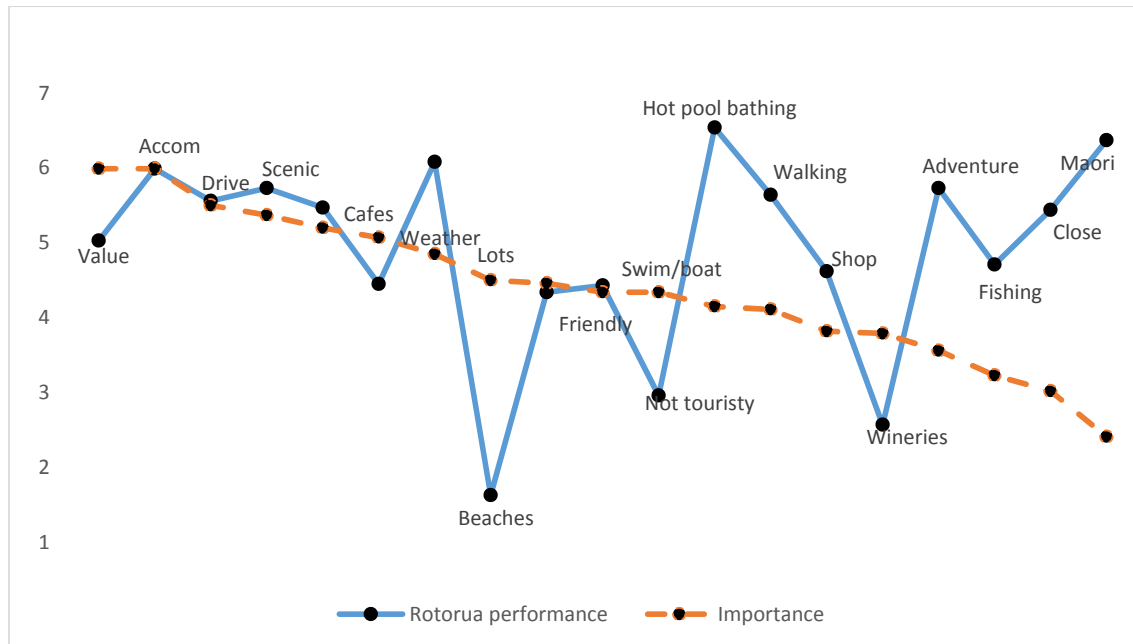**Figure 6 – Rotorua gap analysis 2014**

Figure 7 – Rotorua gap analysis 2000

5. CONCLUSION

Even though there are hundreds of published studies related to destination image, there is no clear consensus on how the construct should be measured. In this regard, a combination of two theories from psychology, was used to develop a practical means for DMOs to track destination image over time. The graphical output is suitable for sharing with stakeholders who have little or no research training. The IPA graphics from the 2000 survey were tested in meetings in each of the five destinations to either the board of directors or senior DMO management. At each of these meetings, in which none of the participants had undertaken statistics training, the key points were quickly grasped.

This manuscript attempts to make a contribution to the destination marketing literature by examining one of the three temporal aspects of destination image measurement. Gallarza, Saura, and Garcia's (2002) literature review found the image of a destination might differ depending on 1) length of stay, 2) the effects of previous visitation, and 3) over a long period of time. They identified a major gap in the literature relating to the measurement of a destination's image over time. The aim of this project has been to monitor a destination's perceived strengths and weaknesses over two decades, in one key market, for a specific travel situation, relative to four competing places. Three studies were undertaken, underpinned by

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multi-attribute theory and personal construct theory, using the same measurement instrument, but with different samples, in 2000 (see Pike & Ryan, 2004), 2014 (see Gentle, Pike, Kelly & Beatson, 2016), and 2019.

In the 2000 study, extensive exploratory research involving personal interviews with consumers and practitioners, combined with a review of the literature, was undertaken to identify the destination image attribute scale items (see Pike, 2003). There are two points worth noting in this regard. First, there was a consistency over time of the relative importance of each attribute, and particular two rated most important by each sample for this travel situation: 'Good value for money' and 'Suitable accommodation'. Destination marketers interested in the short break drive market should consider incorporating these into marketing communications, along with relative strengths. Another opportunity is to explore the antecedents of these two attribute themes. Accommodation might not seem as alluring as beaches, theme parks or other attractions, but this is the major ticket item for this travel situation. The second point is that one of Rotorua's most prominent tourism resources is Maori culture, for which the destination is New Zealand's flagship. For example, the government established the New Zealand Maori Arts and Crafts institute in Rotorua under an act of parliament in 1926, to maintain Maori art forms (see www.NZMACI.com). However, the mean importance for this attribute was consistently below the scale midpoint for this important domestic market. Given Maori culture is a major drawcard for international markets, this finding highlights how a destination's perceived strengths can vary across different markets and travel situations.

Conceptually, it is recommended research engage with target consumers in an exploratory stage to identify salient attributes for the travel situation, which might differ to those reported in the tourism literature. This is important since most destination image studies have not undertaken a qualitative stage, and have not stated an explicit travel situation. A major strength of the Repertory Test technique adopted this study is that it was designed to operationalise personal construct theory. This link between theory and method, which is relatively rare in destination image studies, has strong face validity.

It is important to note there has been a lack of replication studies in the tourism literature; as well as in the wider marketing literature (see Evanschitzky, Baumgarth, Hubbard & Armstrong, 2007). For example, in a post to the TRINet listserve (30/7/08), Professor Chris Ryan lamented this a major issue. Related to this point, Fyall, Garrod and Wang (2012) proposed there had been a lack of debate in the literature about destination image change. In this project the reliability of the 2000 research design was demonstrated in the 2014 and 2019 findings.

In terms of Rotorua's perceived strengths and weaknesses, there was also a consistency of findings over time across the three samples. It is suggested that regardless of what marketing activities have been undertaken during the two decades by the five destinations, Rotorua's perceived market leadership position has been consistent. This goes some way to support Gartner's (1986, 1993) proposition that positive destination image change takes place only slowly over time. The practical implication of this finding is that DMOs should consider the brand positioning theme and all marketing collateral to be consistent over time, and resist the urge to continually change brand slogans and advertising themes. For example, in the case of Rotorua in this market and travel situation, it is recommended the focus should be on reinforcing positively held perceptions that have been consistent over time.

A strength of this project is that perceptions of the destination were tracked at three points in time, relative to key competing places, at the same time of the year, in the same travel context, in the same important target market. However, it must be noted that three different samples of consumers participated. Future research in this field would be strengthened by the use of a longitudinal study involving the same participants over time. Another limitation of the project is that no analysis of the five RTO's destination marketing tactics has been undertaken. While this might provide insights into promotional effectiveness, and an enhanced understanding for the RTO of what might and might not be working, as mentioned, measuring image formation was beyond the scope of this project. However, this does provide an opportunity for future researchers to explore linkages between marketing activity by the DMO and stakeholders (Brand identity), and actual perceptions held by target consumers (Brand image).

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