Reconstruing place image
A case study of its role in destination market research

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This paper argues that recent developments in the theory of place image hold great potential for tourism marketers, but that their full value has yet to be realized. The article reviews some of the relevant theories of place image, and, in particular, it discusses the differences between what has been termed ‘naive’ and ‘re-evaluated’ images of places. It then demonstrates the value of using place image in market research to assist in the formulation of tourism policy. This is accomplished through a case study drawn from the seaside resort of Barry Island in South Wales, where destination managers included an evaluation of the resort’s ‘organic’ images in their market research to assist in shaping a new tourism strategy. The article concludes by arguing that the adoption of a more integrated approach to place marketing is a valuable exercise for any destination. Copyright © 1996 Elsevier Science Ltd

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The 1990s have seen the continued development of a ‘place marketing’ philosophy, whether in the context of tourism, inward investment or residential development. This has created great potential but also missed opportunities for place marketers. Although places have long been promoted, the recent conceptualization of the tourist destination as the product component of the place marketing mix takes ‘place’ fully into the realms of the marketing profession. One of the most useful consequences of this has been the renewed interest in place image. It is argued that comprehensive place image studies are an effective vehicle for assessing the strengths and weaknesses of tourism destinations, particularly with regard to the perceptions of actual and potential tourists. The application of place image theory is especially useful when it includes both the ‘organic’ and ‘projected’ images of a destination, comparing these with the ‘re-evaluated’ image of actual tourists. However, this potential for place image studies has perhaps yet to be realized by destination marketers. This is the result of a number of factors, not least the scarcity of convincing published research aimed at the industry. This article seeks to address that shortfall by combining a critique of the theory of place image with a practical case study.

The paper begins by reviewing some relevant theories of place image and, in particular, it discusses the differences between ‘naive’ and ‘re-evaluated’ images of places. Its substantive contribution to the place image field, however, is its demonstration of the value of using place image theory in market research, to assist in the formulation of tourism policy. This is achieved through a case study drawn from the seaside resort of Barry Island in South Wales, where destination managers recognized the potential of including the town’s ‘organic’ images in their evaluation. The article argues that this more integrated approach to place image marketing would be valuable for any destination. It contends that it is feasible for many agencies responsible for tourism development to reap the benefits of comprehensive place image studies by incorporating market research techniques similar to those adopted in Barry Island.
Theoretical background

An important development in place image theory has been the comparison of a destination’s image at different stages in the tourist’s decision-making process. At each stage the potential tourist may hold different images of a destination, images which are constructed by the amount, source and objectivity of the available information. This range of imagery has been described as a hierarchy of place images, ranging from initial perceptions based on organic sources, to a modified or re-evaluated image upon visiting the destination. This modification results in a much more ‘realistic, objective, differentiated, and complex image’.4

The potential tourist's image of a destination derives from a variety of sources which have been categorized as ‘projected’ and ‘organic’ images. Official tourist organizations are responsible for the projected image whilst the organic image may be said to derive from non-tourist sources. Thus, projected images include commercial sources such as guidebooks and advertisements, and organic sources include popular culture, the media, literature and education.5 However, given the relationship which many tourist organizations have established with, for example, the media, this categorization of images into ‘projected’ and ‘organic’ may not be mutually exclusive.

Destination image is an important determinant of tourist buying behaviour. Research by Pearce,6 Woodside and Lyonski7 and Goodrich7 demonstrates a clear relationship between positive perceptions of destinations, and positive purchase decisions. Although these perceptions may not be based on fact or first-hand experience, they nevertheless exert a vital influence on a potential tourist’s decision to visit a destination. Similarly, negative images, even if unjustified, will deter potential tourists and result in a non-purchase decision.

It follows that there can be significant differences between the organic and projected images which a tourist has of a destination before visiting it, and the re-evaluated image which is formed following a visit. In other words, there may be significant discrepancies between the naive image, consisting of the organic and projected image, and the re-evaluated image, which includes the perceptions of the product itself. These discrepancies can arise from unrealistic naive images held by the tourist or from a failure to meet expectations on the part of the destination.

Significantly, destination images are influenced by a much wider spectrum of information sources than other products. Coastal resorts, for example, may be subject to negative media reporting of social and environmental conditions, and these negative organic images are incorporated into the destination’s naive image. Unfortunately, this naive image is the basis for purchase decision making for the majority of potential visitors, a process which in itself is perhaps much more complex than was originally thought. Potential visitors may not have visited the destination, and may not have been exposed to the more commercial projected sources of information. It is therefore imperative that promotion managers include these ‘non-visitors’ in any market research study. Understanding the differing images which visitors and non-visitors have of a destination is invaluable, enabling the salient attributes of the naive image and the re-evaluated image to be incorporated into tourism marketing planning.

Marketing implications

The strong correlation between perceptions of a destination and destination preferences,7 together with the possibility of separating naive from re-evaluated images, allows integrated image studies to indicate the priorities for action to a tourism authority and has implications for destination marketing. The periodic monitoring of perceptions can indicate the negative organic images which need addressing, analyse the projected image and reassess satisfaction with various aspects of the product itself.

Tourism authorities have been criticized from some sectors for an over-concentration on promotion, at the expense of the rest of the marketing mix.9 Commercial advertising in the mass media attempts to construct an image of a destination that will force it into the potential tourist’s evoked set, leading to a purchase decision. Periodic monitoring of naive and re-evaluated perceptions, however, highlights both the negative image to be challenged, and perceptions more specific to the product itself. This allows tourism authorities to allocate resources optimally between elements of the marketing mix.

Applying place image theory

One of the problems in the application of place theory, with some notable exceptions,9,10 is an over-reliance on before and after studies, which exclude those who have decided not to visit the destination. If the organic image is unfavourable, a significant proportion of visitors will decide not to visit. It is particularly these non-visitors whom tourism planners and marketers need to know more about. This is in order to identify the nature and sources of this unfavourable organic information, and to consider them in planning their promotional activity. This is not possible if marketers evaluate only the actual market, or those who have received information positive enough to result in a purchase decision.

It is much more useful to compare the perceptions of a sample taken from the potential market at

1Recent research by the Wales Tourist Board indicates that the holiday decision-making process is much more complex than some of the consumer behaviour models would suggest.6
comparable destinations, with those of actual visitors at the destination. This approach was used successfully in a comparison of perceptions of the city of Liverpool, where actual visitors and visitors to comparable and competing urban destinations were interviewed.2 Interesting and pronounced discrepancies were found for three constructs: safe—unsafe, thriving—run-down and clean—dirty. This enabled a number of policy recommendations to be made. The study also uncovered the overwhelming influence on visitor decision making of a limited number of organic components of the destination’s image.

It is argued, therefore, that the richest data are uncovered by a study which includes both the perceptions of actual visitors and the perceptions of potential visitors. These components of place image can be incorporated into a study which has clear policy implications for the optimum marketing mix for a destination. The same constructs can be used in questionnaires for actual tourists at the destination and in the potential market. Of course, the sampling methods become critical. It is not necessary, however, to use a large sample based on sociodemographic characteristics. Rather, it makes more sense to interview those who are already potential visitors to that destination, as they are visiting comparable destinations. Sociodemographic information, place of residence and other information can also be recorded, enabling market segmentation when the data are disaggregated.

Measuring place image

There is often a degree of trade-off between the application of structured and unstructured survey techniques. Despite their flexibility, suitability for coding and ease of use, structured techniques use constructs that are not necessarily salient to the respondents. Irrelevant constructs can be included, and other omitted. This is because the respondent is forced to consider product image in terms of the constructs specified by the scales, and it is very difficult to include holistic or unique characteristics. Unstructured techniques provide rich data but are time consuming to administer, and often challenging to analyse. The use of open-ended questions is usually followed by content analysis and various sorting techniques to determine the image dimensions. Although uncovering holistic aspects, data can be difficult to analyse statistically, it can be difficult to compare different products, and the level of detail depends largely on the cooperation and eloquence of the respondents.

Clearly, it emerges that the richest and most useful data in place image studies are produced by a combination of techniques, or a form of ‘methodological pluralism’.11 Significantly, this position is characterized by a respect for the internal logic of human action, however illogical it may seem to the researcher.12 In the context of place market research, an open approach to elicit the constructs salient to a market segment, and the use of a Likert or semantic differential scale to rate the constructs, would go some way towards achieving this. Very few published studies have used consumers to elicit the constructs of the destination. Fewer still have combined the free elicitation of constructs with a more structured approach to code them.13 If a combination of structured and unstructured techniques is not possible, it is certainly necessary carefully to research the constructs to include. If constructs are to be supplied, they should have been reliably elicited, and relate to a comparable environment.

The analysis of the data need not employ sophisticated statistical techniques. It is noted from Schroader’s environmental cognition study that simpler techniques tend to be just as effective.14 Indeed, it is argued that images are better summarized by graphical techniques. This has been demonstrated with the use of an image index, represented as dominant and subordinate poles (for an example of their use to represent responses on each construct, see Gyte15), or positive and negative demand and supply-side images.** The latter allowed easy comparisons between the ‘naive’ and ‘re-evaluated’ image for each construct.

Is the application of the theory feasible?

There is undoubtedly a growing interest in place image-related research as tourism organizations turn their attention to perception and image-orientated work. For example, the Wales Tourist Board recently commissioned an image study of Wales to inform its marketing planning activities, which used a combination of qualitative or projective and quantitative techniques.16 Despite this innovative approach, however, it remains true that many public sector tourism organizations, particularly at the local level, are either yet to be convinced of the potential of place image studies or are unsure of how they can be cost effectively applied.

There are understandable doubts as to how these promising yet academic place image theories can help a local tourism organization formulate its tourism strategy. The lack of published commercial studies and the lack of convincing academic applica-

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1There are examples of studies which elicit, rather than supply constructs, although the majority use supplied constructs. Selby’s doctoral thesis (in progress), combines repertory grid analysis, with the use of consensus grids to survey a larger sample of urban tourists. A notable published example is Pearce.5

2Selby’s place image study (1995) uses four image indices to represent positive and negative perceptions on both the demand and supply side. These were calculated for 11 constructs and the indices represented in formats enabling comparisons to be made.
tions have unfortunately contributed to these doubts. Critically, place image studies, especially those which also examine perceptions in destinations' generating regions, are still perceived as unrealistic and inconsistent with the current financial pressures on the local public sector in the UK.

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The resort was very successful historically when the authority was also able to use the resort as a local authority and the Borough Council to secure further grant aid for improvements. The Welsh Development Agency provided £1.6 million, the Welsh Office Urban Development Fund £500 000. This money was the catalyst for the future as a tourist resort was in doubt. This realization of 46 000. It is the administrative and service centre of the Vale of Glamorgan, a major port on the Bristol Channel and a centre of an expanding chemical industry. It also has major economic and social problems and is characterized by a high level of unemployment, which at 12% is above the national average. 18

The Borough Council recognized that unless the resort's image in its fabric, infrastructure and attractions, together with the competition of the package holiday boom, brought decline in the 1970s and 1980s.

The resort suffered particularly from the withdrawal of Butlins from the Island in the mid-1980s and from a reduction in its day visitor market as a result of its poor image and dilapidated environment. Of further damage to its image was its acquisition of a reputation for violence and drunkenness in the early 1980s. By the late 1980s Barry Island had become extremely run-down, 'a typical example of a destination which has unfortunately contributed to these doubts. Critically, place image studies, especially those which also examine perceptions in destinations' generating regions, are still perceived as unrealistic and inconsistent with the current financial pressures on the local public sector in the UK.

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scheme in order to support further expenditure, and to indicate future priorities.

The tourism study
In 1993, as part of a wider Barry Joint Venture initiative, the partnership of local authorities and public agencies undertook a tourism study to reappraise the BIRAP and the existing tourism-oriented schemes, and to identify opportunities for the future. In particular, the study sought to assess the benefits to Barry’s economy of the recent environmental improvements. The study was conducted in association with the Wales Tourist Board and built on two previous tourism studies commissioned by the Borough Council in the late 1980s. The research contract was won by Coopers & Lybrand Associates, the consultants who had undertaken the original tourism study for the Vale of Glamorgan Borough Council in 1987. A key area of the tourism study was to develop an updated visitor profile for Barry Island and to achieve this Beaufort Research Limited, a Cardiff-based market research company, was commissioned to undertake visitor questionnaires.

The first element of this survey followed a familiar path, taken by many local authorities. Two surveys were conducted at Barry Island, an off-peak survey in May and June 1993 and a peak season survey in July and August of the same year. These surveys, based on 850 interviews, provided much interesting and useful data on visitor characteristics and levels of satisfaction with the resort. It was realized, however, that it was not adequate merely to consider actual visitors and their perceptions of Barry’s tourism product. Just as important were potential visitors in the catchment areas, and perhaps more important were those who reject Barry, possibly because of negative organic images, and visit competing destinations. Reflecting this need ‘to understand the views of potential and past visitors to the Island’ two more surveys – a catchment area survey and a competing resorts survey – were undertaken in addition to the surveys conducted at Barry Island.

The first was undertaken in the key catchment areas for Barry Island: Cardiff, Newport and the South Wales valleys. Respondents were asked about their holiday-making habits, their preponderance to take day trips and the type of destinations visited. They were then asked if they had visited Barry Island, what they liked and disliked about the resort, and what were their key reasons for visiting the resort. Those who had never visited the resort were asked what would encourage them to visit the Island.

The competing resorts surveys were undertaken at Porthcawl, a resort approximately 20 miles west of Barry on the South Wales coast, and at Weston-Super-Mare, a resort on the English side of the Bristol Channel. Both resorts were considered to have a similar product and market to Barry and were chosen as two of its main rivals. This survey had two main components, one which analysed the respondents’ reasons for visiting Porthcawl and Weston, and the second which discussed their images and perceptions of Barry.

Research findings
The surveys provided extremely useful data for tourism planners. The consultants’ report itself concluded that the market research provided ‘an excellent base for developing a tourism strategy’ since it was ‘the most comprehensive research ever undertaken on Barry Island’ (p 1). It confirmed, for example, that the resort’s visitors were still largely drawn from its traditional local catchment areas, with almost 80% coming from South and Mid Glamorgan and Gwent in South Wales. The visitor profile reflected that of these catchment areas, with 73% being from the C2DE socioeconomic group drawn by the ‘attraction of the particular product Barry offers’ (p 4).

The results of the catchment areas and competing resorts surveys were extremely useful as they provided details of the perceptions of those who no longer visited Barry Island. One of the key findings was that ‘those surveyed in Weston-Super-Mare, Porthcawl and in the catchment area still had an image of Barry Island being dirty and tatty’ (p 7). Whilst it is true that there are some prominent areas of the resort which remain unsightly, especially at the entrance to the resort, these perceptions may reflect the condition of the resort prior to the recent improvements. It seems that naive images dominate, representing the perceptions of those who have not recently visited the resort. They are not based on experiencing the improved Barry, but they continue to repel many potential visitors.

It is interesting, for example, that three-quarters of those interviewed at the destination had noticed an improvement in the resort since their last visit. A quarter noticed the clean beach and sea and 14% liked the clean environment. In response to the unprompted question, ‘what improvements/changes have you noticed’, over 50% of the interviewees in the peak season survey said that the sea front or promenade was smarter. The levels of satisfaction experienced by visitors to the Island, with 96%,
either fairly or very satisfied with their trip, clearly indicate that those who visit the resort are satisfied with the product. There do, however, appear to be significant discrepancies between the naive re-evaluated images, or between those who have not recently experienced the product and those who have. Those who have not visited Barry recently have very negative perceptions of certain aspects of the product (18 pp 6–7).

Policy implications

Barry Island’s major strength was its high level of awareness, with 90% of those interviewed having been there in the past and 75% having visited the resort five or more times before. These findings clearly demonstrate the appeal and the consistent pulling power of the resort product. However, creating a positive image amongst those who were not visitors to the Island was seen by Coopers & Lybrand as the key strategic objective for the resort. Not only was this considered crucial to attracting potential visitors, it was also seen as being critical in attracting private sector investment. Coopers & Lybrand commented: ‘From our analysis of the market and discussions with potential developers, we conclude that Barry Island’s ability to attract major investment projects is limited by . . . the perception of Barry Island as a low quality and declining resort’ (18 pp 15, 19).

To overcome this perception revealed in the competing resorts and the catchment area surveys, the consultants proposed a public relations campaign and a ‘major programme of re-education’ to eradicate and ‘to alter misconceptions’. These would target coach operators, potential visitors within two and a half hours’ drive time and the Island’s own traders, who act as ambassadors for the resort (18 pp 23–26).

When it launched the BIRAP in 1989 the Vale of Glamorgan Borough Council considered that the immediate priority was to develop the product, to improve the physical infrastructure of the resort and to create ‘the right environment for investment’ before launching high-profile promotional campaigns.23 The Tourism Topic Report fully endorsed this strategy, but concluded that the time is now ripe to change direction: ‘in the light of the results of the market research and the recent and planned developments, an opportunity now exists to actively promote the Island’ (18 p 25).

The consultants concluded that ‘the market research demonstrates that Barry Island’s core market is primarily semi-skilled or unskilled manual workers with children, living in South Wales and visiting for the day, several times a year’. Recognizing that this was probably to continue to be the major market, they were of the opinion that: ‘Expectations for the Island’s future must be realistic: the Island is un-
the conceptualization and measurement of place image can create new opportunities for destinations seeking to develop tourism. In particular, place image techniques can be used as a policy analysis tool, enabling the strengths and weakness of the product and its naive images to be assessed. This policy analysis role of place image theory, and the importance of including organic images in the market research, was recognized in the Barry tourism study. The study indicated that following the BIRAP, Barry’s tourism product was greatly improved and that it was perceived positively by visitors. However, it recommended that having invested heavily in the resort infrastructure, the time was now opportune to engage in higher profile promotional activity. This was critical to counteract the negative and outdated images which still persisted outside the town amongst potential tourists.

In this instance the research findings directly influenced the Vale of Glamorgan Borough Council’s tourism policy for Barry Island. In addition, as well as indicating the need for a change of emphasis from product to promotion in the marketing mix, the study also reaffirmed the value for money which the public sector agencies had gained from the product investment. In this respect, the research provided support for approaches to government organizations for funding, since it emphasized the contribution of tourism to the local economy. It is useful to recognize here the overriding political imperatives which frame measurement of the performance of tourism. The development of tourism by the public sector, with its competing funding priorities, increasingly has to be justified as an economic development tool, since the industry still retains a ‘candy-floss’ image of part-time, low-paid jobs. In view of this, research which demonstrates the economic and environmental value of tourism is a powerful weapon.

In this context of budgetary constraints, many public sector organizations may consider such market research to be a low priority when faced with competing demands for a range of services, including social services, education and housing provision. However, given the increasingly important economic development role of tourism and place marketing, it is vital that public sector organizations invest in what is effective, but not necessarily expensive, market research to underpin their programmes. Clearly, partnership and the pooling of resources are the way forward in an era where budgetary pressures are prompting public sector organizations to review critically their priorities. Partnership in all areas, including research and monitoring, is certainly the way in which Barry achieved its image data and that model surely holds the key to cost-effective research.

It is significant that this research project on Barry Island may serve as a template for future Wales Tourist Board-sponsored research. The fact that the Board largely replicated the methodology in their Porthcawl study is testament to the fact that the agency is increasingly aware of the benefits of such an approach. Of course, new questions are raised as a result of such research. One concerns the degree to which negative organic images, once identified, can be changed.

Nevertheless, a profile of the strengths and weaknesses of a destination, which incorporates organic images, necessitates research on the formation of these images. There also appears to be a dearth of publicly available information concerning the effectiveness of the various place marketing tools available for image management. It is maintained that the application of place image to destination market research can be invaluable in identifying the image strengths and weaknesses of destinations. Only further research will indicate the extent to which negative images can be practically and cost-effectively addressed.

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