

**THE ROLE OF BRANDING
IN ATTRACTING INWARD TOURISM TO A DESTINATION:
THE CASE OF SLOVENIA**



BY

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Abstract

Destinations worldwide are competing for inward tourism, in which their image as a tourism destination is becoming more and more important. Branding is a method that can help these destinations to create a desired image, which is the reason it is an important topic for the tourism industry. Nevertheless, destination branding is a young discipline and a relatively unexplored field for branding professionals.

The definition of problem therefore is: 'What can be the role of branding in attracting inward tourism to a destination?' As the dissertation is partly written as an advice to the client company Europe Destination Marketing, one of the sub questions is 'How can Europe Destination Marketing apply destination branding to the situation of its clients?'

This is first researched from a theoretical perspective in which the practice of destination branding is defined and compared to other related disciplines. Furthermore, the brand building process is explained, success factors and challenges are identified and a critical view is placed upon the possibilities and limitations of destination branding.

Secondly, the definition of problem is answered from a practical perspective, by looking at the case of the 'I feel Slovenia' brand. Through the use of a questionnaire that was held among foreign visitors in Slovenia, the brand equity of the 'I feel Slovenia' brand is measured. Several expert interviews were used to evaluate the process of developing the 'I feel Slovenia' brand.

The conclusion to the definition of problem is that there are two roles that destination branding can have: Firstly as an internal tool for destinations to align their communication messages around one central theme, which is the brand identity. A precondition to be able to build such a brand is that there is a strong foundation under the brand, which means that there is at least financial and political commitment to the branding project, that there are partnerships with key stakeholders in the tourism industry and that there is sufficient knowledge of marketing and branding.

A second role of a destination brand can be the one that well-known consumer brands have: to differentiate themselves from competitors, to help the consumer

in making choices and to add value to a product or service. Although there are huge challenges to overcome before a destination brand can reach this status, the potential of such a destination brand is huge.

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List of Abbreviations

CCE	Central and Eastern Europe
EDM	Europe Destination Marketing
FDI	Foreign Direct Investment
GCO	Government Communications Office
NTO	National Tourism Organisation
PPP	Public Private Partnership
STB	Slovenian Tourist Board
STO Benelux	Slovenian Tourist Office Benelux

1 PRELIMINARIES

1.1 General introduction to the topic

The major topic of this dissertation is the promotion of tourism destinations through the use of branding. The existing theory on destination branding is relatively young and still developing very rapidly. In practice, destination branding has only been applied since a decade. As destination brands takes at least ten or twenty years to develop, there is no finished case yet and therefore no agreement on its successfulness. However, that branding is worth looking at for destinations is clear from the interest there is for the topic.

1.2 Justification of the subject

First of all, according to the United Nations World Tourism Organization (UNWTO, n.d.), tourism is “one of the fastest growing economic sectors in the world,” with international tourism arrivals growing at an annual rate of 6,5% between 1950 and 2005. This in an increase of 3093% in international tourism arrivals in 55 years time! “The income generated by these arrivals grew at an even stronger rate reaching 11,2% during the same period.” The worldwide tourism industry had an annual turnover of around US\$ 680 billion in 2005 and creates jobs for nearly 200 million people (UNWTO, n.d.).

Related to the rapidly growing tourism industry is the fact that more and more destinations are competing for the same potential visitors. “While in 1950 the top 15 destinations absorbed 88% of international arrivals, in 1970 the proportion was 75% and decreased to 57% in 2005, reflecting the emergence of new destinations, many of them in developing countries” (UNWTO, n.d.). To attract tourists, these ‘new’ destinations need to get hold of a certain image, a little bit of space in the consumer’s mind. This is why the practice of ‘destination branding’ is becoming more and more important, both in the academic world as in practice. Moilanen and Rainisto (2009) note that “there has been a significant increase during the last five years in research in the field of place branding” (p. 4) and that “destination branding is one of today’s ‘hottest’ topics among place marketers” (p. 8). According to Olins (as cited in Konečnik, 2004), branding has been a growing development, but “research studies on this topic are limited” (p. 307).

The reasons for choosing Slovenia as the example destination in this research are diverse. First of all, since the independence of the country in 1991, the Slovene government has placed strategic focus on the tourism industry and on attracting more foreign visitors. This has resulted in a 142% increase in foreign visitors to the country between 1995 and 2008 (Slovenian Tourist Board, 2008). This is obviously due to many factors, but the well established Slovenian Tourism Board (STB) certainly has played a role. Secondly, the Slovene government and the STB have developed an extensive country/destination brand, which places Slovenia among the first countries in the region to apply destination branding. This makes Slovenia a good candidate to evaluate the success of destination branding. According to Szondi (2007), Slovenia is a transitional country, and its country branding efforts can “provide valuable insights and experiences for other transitional regions as well” (p. 8). Also, in a small country such as Slovenia, which is a relatively unknown tourism destination, it is easier to measure the results of destination branding and isolate them from other factors. Apart from all these reasons that make Slovenia a good example, it is also a country that lies in the region in which the client company, Europe Destination Marketing (EDM), operates (see section 1.8 for more information on EDM). There are also practical justifications for focussing on Slovenia, as many documents about the Slovenian tourism industry are available in English and the country is not too distant to visit for research. Moreover, there are reliable statistics available about the Slovenian tourism industry and there are several academic writers who have published about destination branding in Slovenia.

1.3 Definition of problem

Europe Destination Marketing is a young public relations advisory company that supports several South-Eastern European countries in promoting their tourism destinations on the Benelux market. EDM now has a contract with the National Tourism Organisation of Serbia and works on project bases for the national tourism organisations of Montenegro and Macedonia. It is the ambition of EDM to strengthen its partnerships with these countries and to become a partner for other countries in the region as well.

Serbia, Montenegro, Macedonia and many other countries in South-Eastern Europe have only started since a few years to actively promote their tourism industries and all have chosen different strategies and methods to accomplish

this. According to Van der Avoort (personal communication, 18 May 2009), director of Europe Destination Marketing, their national tourism organisations are not very well established yet and they have to work with limited budgets. Moreover, he states that promotion of tourism is not everywhere a government priority and in general, there is no clear vision of the future of tourism that is shared by all the key players (e.g. national- and regional tourism boards, government, hotels, attractions, etc.) in these countries. Other problems are that there is little cooperation between these key players and that there is no agreement about a positioning strategy in foreign markets.

As these countries are still in the very beginning of the promotion of their destinations, the practice of destination branding is probably still a few steps away, but the rapid developments in this practice over the last years, might bring some interesting and promising opportunities for these countries in the (near) future. Therefore, it is also interesting for EDM to see what the possibilities of destination branding are and how they could benefit from the opportunities that destination branding offers. As a result, they might be able to help Serbia, Montenegro, Macedonia and other South-Eastern European countries with the branding of their destinations.

Insight in the possibilities and opportunities that destination branding offers is not only useful for EDM, but also for the national tourism organisations of destinations in South-Eastern Europe and other destinations that want to attract inward tourism with the help of communication. Therefore, the definition of problem is as follows:

What can be the role of branding in attracting inward tourism to a destination?

Related to this definition of problem, two sub questions are formulated:

- How well is the process of developing the 'I feel Slovenia' brand done and how successful is the 'I feel Slovenia' brand in the field of tourism? What can other destinations learn from the experiences of Slovenia?
- How can Europe Destination Marketing apply destination branding to the situation of its clients?

1.4 Operative definition of problem

- **Role:** In the context 'what can be the role of', 'role' has the meaning of 'function in a particular situation'.
- **Branding:** A brand is defined by Kotler, Wong, Saunders and Armstrong (2005) as "a name, term, sign, symbol or design, or a combination of these, intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors" (p. 549). Branding then, is the art and science of creating and maintaining a brand. See also the discussion in section 3.1.2.
- **Attracting:** From the verb 'to attract', which means 'cause someone to come to a place...' (Oxford English Dictionary).
- **Inward tourism:** Tourism is 'the business of organizing and running holidays and visits to places of interest' (Oxford English Dictionary). Inward tourism means tourism directed towards the destination itself, which is attracting tourists from outside the destination to the destination. The opposite of this is outward tourism, which is directing tourists from the destination itself towards other destinations.
- **Destination:** Destination means tourism destination in this context, which is "an amalgam (mixture or blend) of tourism products and services, offering an integrated experience to consumers in a geographical region and physical setting, which its visitors understand as a unique entity" (Moilanen and Rainisto, 2009). Any geographical region can be a destination, but in this dissertation the focus is on country destinations. See also the discussion in section 3.1.1.
- **Well done:** To what degree has the responsible branding team involved in developing the 'I feel Slovenia' brand been able to overcome challenges and to what degree have important theoretical insights, as presented in the theoretical framework, been applied.
- **Successful:** To what extent does the desired image of the destination correspond with the actual image of the destination as it is held by visitors to Slovenia, that were questioned through a questionnaire. See also the discussion in section 3.7.
- **Process of creating:** The process of creating the 'I feel Slovenia' brand is everything that has been done by the responsible branding team to

establish, develop and maintain the brand, since the very first idea up until now.

- **The 'I feel Slovenia' brand:** The brand that has been established by the Slovenian Ministry of the Economy and which is now under the responsibility of the Slovenian Government Communication Office. The brand, both as a visual and as a concept, as it is defined in *the Brand of Slovenia* (Slovenian Ministry of the Economy, 2007).
- **Area of tourism:** The 'I feel Slovenia' brand is a country brand that represents the Slovenian businesses and industry, the cultural sector, the sports world and the tourism industry. 'Area of tourism' means in this context the successfulness of the brand for the tourism industry.
- **Other destinations:** Any destination in the world, but the focus is on country destinations that are in their branding developments at a lower level than Slovenia. Special attention is paid to the destinations in South-Eastern Europe.
- **The experiences of Slovenia:** Everything that the organisations and people involved in the 'I feel Slovenia' brand have learned about destination branding (theoretical and practical insights, challenges, success factors, advises, etc.)
- **Europe Destination Marketing:** The client company of the dissertation. See section 1.8 for a detailed description of the company.
- **Apply:** 'Bring something into operation or use' (Oxford English Dictionary), which means in this situation to translate knowledge into strategies, policies and practices.
- **Destination branding:** The practice of branding a destination. See also section 3.1.2.
- **The situation of:** 'A set of circumstances which exist at a particular time and in a particular place' (Oxford English Dictionary). In this specific context the state of development of the tourism industry, existence of partnerships between stakeholders in the tourism industry and the existence of experience and knowledge of marketing, promotion and branding.
- **Clients:** Clients or future clients of Europe Destination Marketing. Current clients are the national tourism organisations of Serbia, Macedonia and Montenegro.

1.5 Restrictions to the research

Although the marketing of places and the marketing of destinations are often overlapping, also in the case of Slovenia, the research focuses on the latter. This means that the research only looks at the marketing efforts destinations undertake with the specific goal of attracting tourists, as opposed to attracting residents and workers, attracting business or stimulating exports. Within the field of destination marketing, the attention is on the role of branding in this marketing process.

The theory on destination marketing and branding is valid for all sorts of destinations, but the focus of the research is on the destination of Slovenia, the Slovenian Tourist Board and the 'I Feel Slovenia' brand. Although recommendations on destination branding are given to other destinations, no research about these destinations is done.

The research tries to contribute to a theoretical and practical debate and forms a general guideline for the way destinations could be marketed and/or branded successfully. Although the research is undertaken for the client company Europe Destination Marketing, it will only briefly touch upon the current strategy and working methods of EDM. The report should therefore be read as research that describes a development that could be interesting for EDM. Further research would be needed to apply the conclusions of this research more specifically to the situation of EDM.

1.6 Purpose and rationale

There is both a theoretical and a practical purpose to this study. The theoretical purpose is to clarify the debate that takes place among both practitioners and academics, about the usefulness and the benefit of branding a destination.

The practical purpose of this study is to give direction to any destination in the world that is in its destination branding development below the level of Slovenia, with special attention for destinations in South-Eastern Europe, about the road they could follow in promoting their destinations. With the example of Slovenia, the successfulness of destination branding is evaluated and failures, challenges and success factors in the destination branding process are identified. This knowledge will help the client company (Europe Destination Marketing) to

consider the opportunities that the practice of destination branding might offer them, it will give destinations an introduction into the usefulness of branding and it might give the Slovenian Tourist Board and the brand management of the 'I feel Slovenia' brand some new insights and ideas.

1.7 General structure of the report

After the preliminaries (chapter one), the report starts with a description of the methodology that is used (chapter two). What follows is a theoretical framework (chapter three) that consists of several parts: first some important definitions and the position of destination branding in relation to other marketing domains is explained. Next is an evaluation of the advantages of destination branding over promotion and a critical discussion about the question if destination can actually be branded. The next section of the theoretical framework describes a process of how destinations are branded, which is followed by two sections that are respectively about challenges and success factors in destination branding. The theoretical framework is followed by a chapter (four) in which the destination brand and the destination branding process of Slovenia are described. The next chapter (five) presents the results of the research, which are analysed and on which conclusions are drawn and the definition of problem is answered. The methodology, theoretical framework, the case of Slovenia and the conclusions of the research ultimately lead to the recommendations (chapter six). The bibliography (chapter seven) is followed by the appendices (chapter eight), which contain among others information about tourism in Slovenia, interview summaries and detailed research results.

1.8 General information about the client organization

Europe Destination Marketing is a public relations and advisory company that supports South-Eastern European countries to promote themselves as tourism destinations in the Benelux. These countries do not have a branch of their own national tourism board in the Benelux or have other reasons to seek expert advice from EDM. Activities of EDM include the organisation of press- and tour operator journeys, the publishing of press releases and the coordinating of the presence of its client destinations on tourism fairs in the Benelux.

EDM was established in 2007 by Dennis van der Avoort and Arjen Rooms. The company is officially registered in Rotterdam but also works from Delft, where it

shares an office with the Zuid-Holland Bureau for Tourism. As was said before, it currently has a contract with the National Tourism Organisation of Serbia and works on project bases for the national tourism organisations of Montenegro and Macedonia.

2 METHODOLOGY

Through both an investigation of the theory on destination branding, and an evaluation of the destination branding efforts of Slovenia, the definition of problem will be answered. What follows is a description of the different research methods and sources that are used.

2.1 Literature

The literature that is used in this research can be divided into three main categories:

- First of all, literature on the marketing of places, for example by Ashwort and Goodall (1990) and by Kotler, Haider and Rein (1993). This is rather general literature, which is useful to see the context in which destination branding operates.
- Secondly, literature is used that is more focused on branding, and not only of places but also specifically for destinations. Examples of this are Moilanen and Rainisto (2009) and Morgan, Pritchard and Pride (2004). These authors describe many case studies, from which they derive success factors and challenges in destination branding. Anholt (2003) is a writer on branding too, but more focussed on countries than on destinations. In some cases, the theory on country branding also applies to destinations, which is the reason that occasionally examples from country branding literature are given when destination branding is discussed. Nevertheless, this is always indicated as the term country, nation or place is used in these cases.
- Thirdly, the publications of several academics who have published about the specific destination branding efforts of Central and Eastern European countries (Hall, 2004; Szondi, 2007) or even about the case of Slovenia (Konečnik, e.g. 2002, 2004). This literature is most helpful to see what has been done with destinations branding in the region so far.

2.2 Other documents

Several documents were are to learn about the Slovenian tourism industry, about the Slovenian Tourist Board (STB) and its strategy and about the 'I feel Slovenia' brand. Examples of these are *Slovenian Tourism in Numbers* (Slovenian Tourist

Board, 2008), *Development Plan and Policies of Slovene Tourism 2007-2011* (Slovenian Ministry of the Economy, 2006) and *The Brand of Slovenia* (Slovenian Ministry of the Economy, 2006).

2.3 Interviews

Four interviews were conducted to get more information about destination branding in South-Eastern Europe, the specific destination branding case of Slovenia and the 'I feel Slovenia' brand. All these interviews are one-to-one, semi-structured interviews, that lasted about an hour each on average. The interviewees received an overview of the questions in advance. For more information and a summary of all these interviews see the appendix.

As the dissertation is partly written as an advice to the client company, Europe Destination Marketing, two meetings with Mr. Dennis van der Avoort were held, the founder and general director of this company. The first meeting was held on the 18th of February 2009, in which Mr. Van der Avoort explained about the activities and the clients of the company. This first meeting was mainly intended to give direction to the definition of problem and to the research. A second interview was conducted at the company's office on the 19th of May 2009, during which the development of tourism and destination marketing in several South-Eastern European countries were discussed.

Mr. Matjaž Kek, Secretary at the Slovenian Government Communication Office (GCO) and brand manager for the 'I feel Slovenia' brand, was interviewed on the 7th of May 2009 in Ljubljana, Slovenia. This interview was used to acquire information about the role of Mr. Kek and the GCO in the 'I feel Slovenia' brand and about the process of building the brand.

A second interview was conducted with doc. dr. Maja Konečnik, assistant professor in the marketing department of the Faculty of Economics of the University of Ljubljana. As was already noted in section 2.1, Ms. Konečnik has published in several journals about destination branding in Slovenia and was as an external expert involved in the planning process and the identity creation for the 'I feel Slovenia' brand. The interview was conducted on the 7th of May 2009 in Ljubljana. The interview was mainly about previous marketing campaigns for Slovenia as a tourism destination, the planning process for the I feel Slovenia

brand and about Ms. Konečnik's own view on the practice of destination branding, its advantages and disadvantages and the developments in this field.

A third interview was conducted with Mr. Rok Klančnik, director of the Slovenian Tourist Office for the Benelux. Mr. Klančnik does not only represent the Slovenian Tourist Board in the Benelux, he was also the first manager of the STB in Ljubljana when it was established in 1995. Moreover, Mr. Klančnik was in a previous function director of communication at the World Travel Organisation. He was part of the expert group that helped to establish the 'I feel Slovenia' brand and works with the brand on a daily basis in order to promote the destination of Slovenia on the Benelux market. The interview was conducted in Brussels on the 26th of May 2009.

Mr. Kek, Ms. Konečnik and Mr. Klančnik are very knowledgeable on the 'I feel Slovenia' brand and with their different points of view they are able to present a complete picture of the brand and the brand building process. Therefore, these interviews are of great value for the research and give a behind the scenes picture of the destination branding.

Unfortunately, I did not succeed in arranging a meeting with Ms. Čehovin (Marketing & Communications Director at the STB in Ljubljana). No response was received after several requests by telephone and e-mail. The purpose of this interview would have been to learn more about the role of the STB in establishing the brand and about the usage of the brand and to hear examples of how the brand is used in advertising and PR. As a replacement for this interview, I approached Mr. Klančnik so that I would still be able to speak with a representative of the STB. Mr. Klančnik proved to be very knowledgeable about the establishment of the brand and about its translation into advertising and PR, as he has been with the STB already since its establishment in 1995. Therefore, no limitations were experienced as a result of not having an interview with Ms. Čehovin.

2.4 Questionnaire

An important part of the research was conducted through a questionnaire. The main purpose of this part of the research was to find out what image foreign tourists in Slovenia have of the destination and if this image is consistent with the 'I Feel Slovenia' brand. In this way, the brand equity or brand value of the 'I feel

Slovenia' brand is measured. This method (questionnaire) was used because it could provide specific data and because it would give very specific answers to questions regarding the image tourists have of Slovenia as a destination.

Because the research was conducted in Slovenia among foreign visitors, there were some considerations that had to be made beforehand. The questionnaire would be in English, but there was the risk that the target group would either not speak English, or only to a limited extent. Hence, the phrasing was as simple and straightforward as possible and there were no compulsory open questions in which the respondents would have to write in English. Another circumstance that was taken into consideration was the fact that the researcher would directly approach the target group in public places and that these people were on a holiday and therefore reluctant to fill in a questionnaire. Accordingly, the questionnaire should not look too intimidating, should not be too long and should be easy to understand. Great effort was therefore made to restrict the questionnaire to the front and back page of one A4 paper. The questionnaire was pre-tested on several fellow students and on a family member with a MSc in Economics, who has a lot of experience in conducting research with questionnaires. Based on their comments some questions were added, omitted or rephrased.

Next to some factual questions about purpose of visit and country of residence, the main part of the questionnaire consisted of statements about the destination of Slovenia, in which the respondents were asked to indicate on a 5 point Likert scale to what extent they agreed with the statements. Some of these statements were based on *The Brand of Slovenia* (Slovenian Ministry of the Economy, 2007), so that the desired brand identity and the brand image could be compared. The research was conducted on the 7th and 8th of May 2009 in the city of Ljubljana, Slovenia, among a population of 39.

It should be taken into account that the results of this questionnaire research are limited for several reasons:

- A population of 39 is reasonable, but certainly less than desired. Although the goal was to reach a population of 80 (with an absolute minimum of 30), it proved to be harder than first thought to find enough tourists during my short stay in Ljubljana that were willing and capable of filling in the

questionnaire. As the results would become biased if additional questionnaires would be conducted among non-visitors of Slovenia, the choice was made not to do this.

- Most of the respondents were visitors of the Celica and Alibi hostels in Ljubljana. These were predominantly young visitors in the age of 20 to 35. Also, visitors of hostels are not only relatively young, but are generally also independent travellers and travelling on low budgets.
- The population for this research was not randomly picked, but was directly approached by the researcher. The population was limited to people who happened to be in Ljubljana on the 7th of 8th of May 2009, many of them visiting either the Celica or Alibi hostel. As the type of visitors to a destination differ with the season, it should be taken into account that the questionnaire was conducted among visitors in the beginning of May. No month can be representative for the whole year, so in a perfect situation the questionnaire would be conducted at several moments throughout the year.
- Another important limitation is the fact that all respondents had to have a reasonable understanding of English in order to be able to read the questions. Therefore, no non-English speakers are included.

Although there are quite a few limitations to the research, the results still give a valid conclusion about the brand value of the 'I feel Slovenia' brand because:

- The countries of residence of the questioned tourists correspond quite well with the percentages of the countries of residence of the visitors to Slovenia. See for a comparison figure 9.2 and 9.6 in the appendix.
- Even though the respondents were relatively young and mainly travelling on a low budget, they are not excluded as a target group for the brand. Therefore, their opinion on the brand is of value.
- Because the population of 39 was small, no crosstabs were made between different questions, in order to prevent too small groups. Therefore, the results are always based on a reasonable amount of responses.

3 THEORETICAL FRAMEWORK

3.1 Explanation of important definitions

Some concepts and definitions are used throughout the report and it is important to make clear distinctions between them. Therefore, they are briefly described and their exact meaning in this dissertation is clarified.

3.1.1 Difference between a place and a destination

The term 'place' refers to a geographical entity, such as a country, a region, a city or a town. A 'destination' is much more specific and "indicates tourism only..." (Hanna and Rowley 2008, 61). According to The Hat Factory (n.d.), a (tourism) destination "can be anything from a nation to a region, a resort to a city, an attraction to an event..." Moilanen and Rainisto (2009) define 'tourism destination' as "an amalgam of tourism products and services, offering an integrated experience to consumers in a geographical region and physical setting, which its visitors understand as a unique entity" (p. 113). There seems to be no agreement among academics if there is a difference between 'tourism destination' and 'destination'. In this dissertation only the term 'destination' will be used, which will always imply a link to tourism, unless stated otherwise.

3.1.2 Difference between marketing, promotion and branding

Kotler et al. (2005) define marketing as "a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others" (p. 6). The marketing mix then, is defined as "the set of controllable tactical marketing tools – product, price, place and promotion – that the firm blends to produce the response it wants in the target market" (Kotler et al., 2005, 34). This means that marketing and the marketing mix include much more than just communication, but also many strategic decisions regarding the actual product, its production, distribution, etc.

Promotion, as one of the four elements of the marketing mix is defined by Kotler et al. (2005) as "activities that communicate the product or service and its merits to target customers and persuade them to buy" (p. 34). Promotion also consists of a mix that is "the specific mix of advertising, personal selling, sales promotion and public relations that a company uses to pursue its advertising and marketing objectives" (Kotler et al., 2005, 719). So promotion is the element of the

marketing mix that is responsible for the communication function. But often, the term promotion as it is used in the literature or in daily speech, does not refer to this general communication function, but to 'sales promotion', which is defined as "short-term incentives to encourage purchase or sales of a product or service" (Kotler et al., 2005, 719). For the general communication function of promotion, the term 'communication' will be used in this dissertation. The sales-promotion function of promotion, will simply be named 'promotion' throughout this dissertation, unless stated otherwise.

Branding then, is related in a somewhat different way to marketing and promotion. Almost any book about the subject opens with the question 'what is a brand?', which suggests the unfamiliarity among readers with its meaning. Kotler et al. (2005) describe a brand as "a name, term, sign, symbol or design, or a combination of these, intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors" (p. 549). Ind (2003) states that "although a brand is related to a physical product or service it is itself immaterial" (p. 3). It "only exists in a buyer's mind and it is the buyer who has the power to begin, sustain or terminate a relationship with it" (p. 3). Brands inform us, help us to make choices and create extra value if they are trusted. Most brands communicate a consistent message, both in style and in content, that helps to the target groups to build up a homogeneous and strong image of the brand.

The major topic of this dissertation is the branding of destinations. Both the definition of 'destination' and 'branding' were given above, which results in the following definition of 'destination branding' by Ritchie and Ritchie (in Hanna and Rowley, 2008):

"A 'name, symbol, logo, word or other graphic that both identifies and differentiates the destination while conveying the promise of a memorable travel experience ... as well as serving to consolidate and reinforce the recollection of pleasurable memories of the destination experience'" (p. 63).

3.2 Destination marketing in relation to place marketing

Kotler, Haider and Rein (1993) describe four main target markets for place marketing: visitors, residents and employees, business and industry and export markets. See table 3.1.

Target market	Segment
Visitors	<ul style="list-style-type: none"> • Business visitors • Non-business visitors <ul style="list-style-type: none"> ○ Tourists (want to see the place) ○ Travellers (want to visit family or friends)
Residents and employees	<ul style="list-style-type: none"> • Professionals • Skilled employees • Teleworkers • Wealthy individuals • Investors • Entrepreneurs • Unskilled workers
Business and industry	<ul style="list-style-type: none"> • Heavy industry • 'Clean' industry assembly, high-tech service companies, etc. • Entrepreneurs
Export markets	<ul style="list-style-type: none"> • Other localities within the domestic markets • International markets

Source: Kotler et al. (1993)

In section 3.1 the difference between 'place marketing and branding' and 'destination marketing and branding' was described. However the great number of similarities, the disciplines are not the same. There are many case studies that describe how the interests of destination marketing and other forms of place marketing have been very different. In Norway, the tourism industry tried to position itself on the German market as a nice summer location. But at the same time, the Norwegian fishing industry campaigned in the same market with images representing Norway's cold weather. "The two projects were conducted at the same time and were basically pulling on the same strings, just in two different directions ... The fact is that in the end, the campaign gave a vague picture of Norway's weather conditions" (Moilanen and Rainisto 2009, 37).

There is also the example of Scotland, in which the interests of the tourism industry and Scottish businesses seemed to clash. The tourism industry wanted to promote fairytale like values such as dramatic scenery and romantic castles. At the same time, "some in the business sector saw it as a negative image that was holding back the development of a modern image of a Scotland that wanted to export technology and attract investment in the knowledge age" (Moilanen and Rainisto, 2009, 54).

The question that arises from the Norwegian and Scottish examples is if destination marketing and other forms of place marketing can be done separately or if they should form one strategy together. There are arguments for both views:

Moilanen and Rainisto (2009) argue that “people are perfectly capable of differentiating between tourism imagery and the business environment. They also understand the difference between fascinating history, contemporary culture and business competence” (p. 54). This would suggest that place marketing and destination marketing can be done separately and can even send different messages. Anholt (2003) mentions that “tourism is often the primary stakeholder in promoting the national brand” (p. 167) and that “tourist promotion is usually the only way in which countries ever consciously engage in marketing themselves to the outside world: it is just about the only area of activity where, traditionally, a government minister and a director or marketing will actually work side by side...” (p. 167).

On the other hand, target audiences do not care if a message is sent by a national tourist office or by an agency responsible for attracting Foreign Direct Investment (FDI) to the country. To them, the messages all mix up into one image of the country. Morgan and Pritchard (2004) argue that “while tourism is just one element of any destination’s economy it should be integral to place marketing since it supports and leads the development of a place brand” (p. 76).

The answer to this debate probably also depends upon the level of involvement the audiences have with the place and on the existing knowledge about the place. Elaboration Likelihood Model theory (Petty and Cacioppo in Dainton and Zelley, 2005) suggests that the more motivated the receiver of the information is and the more familiar the receiver is with that information, the more likely he is to process complex messages. This could also be the reason that less people have trouble to muddle up the names of Britain and Bhutan than those of Niger and Nigeria (Anholt 2003). This would mean that unfamiliar places that are dealing with non-motivated audiences, would best keep their message as simple as possible and choose to work with just one place brand, instead of a separate brand for tourism. Places that are more familiar to their target group and that deal with higher motivated audiences could also consider to use more than one brand/message.

We can conclude that in an ideal situation all the place- and destination marketing efforts are integrated into one communication strategy. But due to the large number of stakeholders involved and the sometimes clashing interests of those stakeholders, it could be almost impossible to develop a complete place marketing strategy from the bottom up. Therefore, it makes perfect sense to start with a destination marketing/branding strategy and build the country marketing/branding on those fundamentals.

3.3 Destination branding's advantages over promotion

The advantages of engaging in a form of marketing to attract tourists are quite clear: a destination that wants to attract more tourists should communicate something to potential tourists to get them interested in visiting their destination. (Sales) promotion could be used for this, which could be anything from placing an advertisement, getting free editorial publicity or giving discounts or other price advantages for visiting the destination. "For a long time", as Moilanen and Rainisto (2009) remark, "it was sufficient for places just to promote the existing place package" (p. 24).

3.3.1 Changed external environment

But there are several reasons why simply promoting a destination is not sufficient anymore to attract tourists: firstly, there is increased competition between destinations to attract tourists. As was said before, in 2005 the top 15 destinations only received 57% of international arrivals, where this used to be 75% in 1970 and even 88% in 1950 (UNWTO, n.d.). Also, the offerings of destinations have become more similar: "most destinations have superb five-star resorts and attractions, every country claims a unique culture, landscape and heritage, each place describes itself as having the friendliest people, and high standards of customer service and facilities..." (Morgan and Pritchard, 2004, 60).

Secondly, where countries used to focus their promotion on neighbouring countries, reduced travel costs and higher standards of living have now made it affordable for many more people in the world to visit distant destinations. Therefore, destinations now have to campaign worldwide to reach their target markets. This creates an inevitable tension between local segmentation and global consistency. According to Moilanen and Rainisto (2009) there should only

be one message to all the marketers, with “some customization but very little” (p. 42). This is another argument for consistent branding as opposed to local promotion.

Another development is that destinations not only have to compete with each other but also with other products, services, organizations and people for media attention. So, “...unless its every appearance in the public domain continually and accurately reinforces a few simple, basic, coherent truths, it is highly unlikely that a homogeneous image will ever form itself in the consumer’s mind” (Anholt 2004, 34).

Fourthly, not only has the competition between destinations and the competition for attention changed, the consumer has changed as well. “Choice of holiday destination” has become a “significant lifestyle indicator”, which makes that destinations need to have “emotional appeal, high conversational capital and even celebrity value” (Morgan, Pritchard and Pride, 2004, 4). See section 3.7.2 for more information on emotional appeal, conversational capital and celebrity value.

3.3.2 Other advantages of destination branding

A common misconception about branding is that it is about starting global campaigns, that will cost millions. Anholt (2003, 123): “Often, there is no need to increase the number of those messages or change the means by which they are communicated...” Destination branding is much more about “aligning the existing communications to a properly worked-out strategy, than by adding yet more new messages to the mix” (Anholt 2003, 123).

Branding not only can have a positive effect on how the place is viewed by potential visitors, but also “on how the place views itself” (Morgan and Pritchard, 2004, 65).

Destination branding is strongly connected to place marketing and although the two are not the same and can work independently, destination branding can actually support the overall place branding. As Morgan and Pritchard (2004) note: “The creation of ... a destination brand opens the way for other economic development-oriented agencies to communicate to would-be investors and

residents” (p. 76). Kotler (as cited in Rainisto, 2006) also suggests that “beginning branding can be a good starting point for place marketing” (p. 53).

According to Kotler and Gertner (in Konečnik, 2004) “brands have been considered to be the marketer’s key tool for creating product differentiation” (p. 307). This view is supported by Morgan and Pritchard (2002), who argue that “destinations cannot afford to ignore branding...” (p. 76). Moilanen and Rainisto (2009) conclude that “international sales promotions can contribute towards brand awareness. But they must be set within the context of a brand development strategy, if they are to have lasting impact” (p. 52). But even though the advantages of branding over simple promotion are numerous, the question remains if destinations may actually be branded, which will be discussed in the following section.

3.4 Criticism on destination branding

If products, services, organisations and even people can be branded, why would this be any different for a destination? Advocates of destination branding namely stress the similarities between destinations and branded products and argue that the advantages branding has brought to these products can also be brought to destinations. “...One of the best known functions of a brand is to act as convenient, everyday shorthand for what a product or company stands for: why not for a city or country too?” (Anholt, 2004, 29). Morgan et al. (2004) also remark that destinations have become style symbols, which make that they can “offer similar consumer benefits” as other “branded lifestyle items” (p. 4). Moilanen and Rainisto (2009) support this view by stating that “a brand is created in the consumer’s mind and the benefits of branding apply to countries and businesses” (p. 7).

However, there is also criticism on destination branding. There is a group that criticizes the very idea that something sacred as a nation could be branded. The French academic Girard (in Morgan et al., 2004) argues that “in France the idea of re-branding the country would be widely unacceptable because the popular feeling is that France is something that has a nature and a substance other than that of a corporation. A corporation can be re-branded, not a state” (p. 60).

Anholt (2003) comments on his experiences as a nation branding specialist: “Wherever you go, branding places is an emotive subject. As Wally Olins

observes, people tend to get upset about the very idea of a nation brand. Somehow, when the fiendish tricks of marketing are applied to something as sacred as the nation-state, all hell breaks loose. Insults are heaped on the heads of brands, marketers and policy-makers alike – ‘spin’, ‘gloss’ and ‘lies’ are the most commonly heard in this country. In my own work, helping to improve the prospects of emerging markets through better branding of the country and its products, I am often accused of ‘rewriting history’, ‘social engineering’, ‘cultural pollution’, ‘exploitation’, ‘condescension’, ‘neo-imperialism’, and worse” (p. 13).

But the criticism seems to be based mainly on emotions and misperceptions. “It appears that it is the word ‘brand’ that raises the blood pressure. It seems to me that there are three reasons why the word ‘brand’ acts like a red rag to a bull to some people: snobbery, ignorance and semantics” (Olins, 2004, 23). Countries have been branding themselves for centuries, it was just called different in those days. The U.S. is a good example as they promoted themselves as the land of opportunities to poor Europeans at the beginning of the 20th century.

The critics seem to think that “today’s marketers can actually ‘brand’ or ‘rebrand’ a place. More accurately, what brand managers are attempting to do is to coordinate an existing brand relationship, to work with and often gradually to change existing perceptions (and misconceptions) of places. In this task, however, they face a number of key challenges, many of which are beyond their control” (Morgan and Pritchard, 2004, 60).

Anholt (2003) gives a good conclusion to the discussion with the advise to destination brand managers not to place too much emphasis on the name of the discipline: “The vocabulary is immaterial: one can call these principles of soft power ‘marketing’ or ‘branding’, but one can equally call them psychology, diplomacy, rhetoric, politics, the art of persuasion, or plain good sense” (p. 13). Anholt (2004) not only believes branding can have advantages for places and destinations, but also for the branding industry itself: “For the first time, the art and science of branding has an opportunity to prove its value beyond the tired old litany of ‘improving shareholder value’, and become recognized as one of the most valuable and relevant disciplines of post-industrial society” (p. 39).

3.5 The destination branding process

Due to the complicated nature of a destination as an organisation, destination branding is often compared with corporate branding models and theories of corporate communications and can therefore in cases also be applied to destination branding. Especially the concepts of identity and image are crucial in the development of a destination brand.

3.5.1 Brand identity

Brand identity is defined by Aaker and Joachimsthaler (2000, 43) as “a set of brand associations that the brand strategist aspires to create or maintain. These associations imply a promise to customers from the organization members.” They add that the brand identity “represents what the organization wants the brand to stand for” (p. 40) and that a strong brand should have a clear brand identity, depth and richness. The creation of a brand identity is, as for all brands, also of crucial importance in destination and place branding. Moilanen and Rainisto (2009) argue that building the identity is central in place branding and that it should be the responsibility of top management.

3.5.2 Brand image

Where brand identity is about the perception of the brand owners, (brand) image is defined by Dowling (in Van Riel, 1995) as “the set of meanings by which an object is known and through which people describe, remember and relate to it. That is the result of the interaction of a person’s beliefs, ideas, feelings and impressions about an object” (p. 72). Kotler (1993) gives a definition of the more specific concept of place image: “we define a place’s image as the sum of beliefs, ideas, and impressions that people have of a place. Images represent a simplification of a large number of associations and pieces of information connected to the place” (p. 141).

Several authors have made further divisions within the concept of image. Goodrich (in Konečnik, 2004, 309) identifies the primary destination image - which is formed by a visit – and the secondary image, which is based on information received from external sources. Milman and Pizam (in Konečnik, 2004) see the destination’s image as divided into three components: “the product (i.e. the quality and variety of attractions, price, uniqueness); the behaviour and

attitude of employees who come into direct contact with tourists; and the environment such as the weather, the quality and type of accommodation, and physical safety” (p. 309).

A destination can have six possible images. According to Kotler (1993) these are a positive image, a weak image, a negative image, a mixed image, a contradictory image or an overly attractive image.

3.5.3 Where to start the brand building process?

There is debate in the literature about the planning process in creating a destination brand: some argue that the creation of a brand identity should come first, others advise to start with image research. “Kapfener stresses the importance of brand identity, because unlike brand image, it is created by the brand owner. Before projecting an image out to the public, the sender must know exactly what he or she wants to project” (Kapfener in Konečnik, 2004, 307). Anholt (2003, 138) argues that “the place to start working out how to brand a country is not with the country itself, but with the consumer and the marketplace,” which can be seen as a plea for starting with image research.

In the branding of new (consumer) products and services, a brand manager is relatively free in filling a brand with values and associations, because there is probably no existing image yet of the product or service that is to be branded. But because destinations are existing ‘products’ with existing images, probably hundreds of years of history, culture, climate, etc., branding is much more about “aligning the existing communications” (Anholt, 2003, 123) than about creating a complete new message or brand. Therefore, a destination brand manager is very limited in the possibilities he has to create the message or brand he would like. This is one of the reasons why I think it is wise to start with doing research into the brand image, instead of forming a brand identity. This view is supported by Morgan and Pritchard (2004) who advocate this strategy in a five step plan for destination brand building, which is presented in table 3.2.

Table 3.2 The five phases in destination brand building

Phase one	Market investigation, analysis and strategic recommendations
Phase two	Brand identity development
Phase three	Brand launch and introduction: communicating the vision
Phase four	Brand implementation
Phase five	Monitoring, evaluation and review

Source: Morgan and Pritchard (2004)

Moilanen and Rainisto (2009) devote a whole chapter of their book *How to Brand Nations, Cities and Destinations* to the operational plan of creating a country brand. They, too, argue that the first thing that should be done after the creation of the organisation (if not in existence yet), should be research on the current image of the country in the home country and in the foreign target markets.

3.5.4 Brand personality

In developing the brand identity (phase two of the presented model), Morgan and Pritchard (2004) stress the importance of brand personality, which is an important part of the brand identity.

According to Morgan and Pritchard (2004) “critical to the success of any destination brand is the extent to which the destination’s brand personality interacts with the target markets. Just like people, all brands should be complex and rich ... Destination brand building is all about developing a rich, relevant brand personality. Developing is the key word here; successful brands never atrophy, instead they reflect and respond to changes in consumers’ lives, and while the brand’s core values remain the same, its personality will continue to evolve. A brand’s personality has both a head and a heart: its head refers to the logical brand features, while its heart refers to its emotional benefits and associations” (p. 70).

The destination brand benefit pyramid in figure 3.1 gives a good overview of the essential elements of a strong brand personality. It describes how a brand personality is constructed from the bottom up and is therefore a very useful tool. At the same time, it can also be used to evaluate a brand personality.

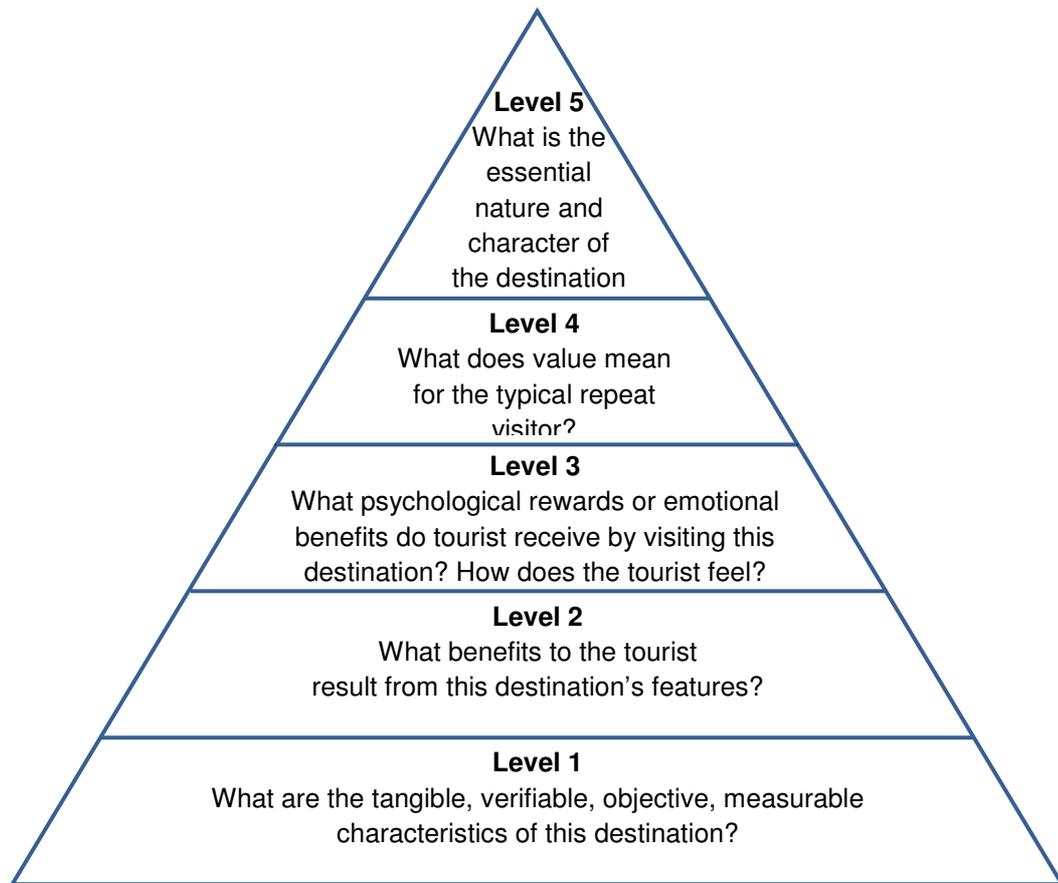


Figure 3.1 The destination brand benefit pyramid

Source: Morgan and Pritchard (2004)

3.5.5 Positioning slogans for destination brands

One of the most visible attributes that results from the brand identity and the brand personality is the positioning slogan, which is often combined with a symbol. Some destinations only have a symbol, but many combine this logo with a positioning slogan. Some of these refer to a location: 'Europe's West Coast' (Portugal) or 'So far yet so near' (Canada). Others stress the uniqueness of the destination, such as 'Uniquely Singapore' or 'Nothing compares!' (Egypt), or the authenticity: 'Travel for real' (Morocco). Jamaica ('Once you go, you know') and Panama ('It will never leave you') make a promise to their potential visitors. Then there are destinations that stress the friendliness of their residents: 'Turkey welcomes you', 'Your holiday...our passion...' (Namibia), or '90.000 friends you haven't met yet' (Aruba). There clearly is a great variety in positioning slogans, but at the same time, they can be incredibly similar. A good example of this convertibility are the slogans of Greece and Greenland: respectively 'The true experience' and 'the greatest experience'. There are probably not two tourism destinations as different from each other as Greece and Greenland and still they use nearly the same positioning slogan.

The problem with these slogans is that they should not be too specific, as it will probably be hard then to represent the interests of the complete nations' tourism industry. On the other hand, if they are not specific enough, such as the example of Greece and Greenland shows, they lose their meaning and connection to the destination. Szondi (2007) comments: "They usually have promised similar experiences and it is difficult to identify the distinct features that would make the country unique in the minds of the potential holidaymakers" (p. 11). The debate about the use and the usefulness of these positioning slogans will probably continue for many more years.

3.6 Special challenges in destination branding

Any branding project is challenging and can be difficult, but the branding of destinations faces even some additional challenges. This is because there are some great differences between destinations and other products and services that are marketed or branded. Morgan and Pritchard (2004) state about these challenges: "no matter where destinations are in their life cycle, by comparison to branded products and services, managers in destination organizations face

peculiar branding challenges” (p. 62). Below are seven main factors, that make destination branding different and sometimes more complicated than ordinary branding.

- **Collective ownership and creating the brand identity**

The first important difference is that “tourism destinations are typically not created by one single company, but instead by a network of independent companies and other actors, whom together produce the services and facilities required in creating the tourism destination product” (Moilanen and Rainisto, 2009, 113). They also describe this difference as the “collective nature, overall ownership, lack of control by individual firms and strong relational emphasis” (Moilanen and Rainisto, 2009, 114).

Especially since a destination is such a complicated ‘product’, it is not so easy to create a simple and clear brand identity. According to Anholt (2003), this is also “the main reason why more than half of all the countries developing their brand strategy at any given moment are quite likely to come up with the positioning ‘land of contrasts’...”. This tendency to have everybody’s voice heard in creating the brand identity can result in a brand identity that is acceptable to all owners of the brand, but therefore also does not grasp the true identity of the brand.

- **Forced network**

“Compared to other company networks, opportunities to choose the best possible strategic parents are limited” (Moilanen and Rainisto, 2009, 20). All local actors (organizations, businesses, etc.) are involved in, and affected by the branding of the destination. They have no option not to take part in the process and the people responsible for the branding can at the same time not exclude any party: they are condemned to each other by geographic location. Where a corporation can sell any bad performing brand or business unit, a destination can only leave a partner out of the planning group, but not exclude the partner from the destination.

- **Lack of management control**

“In a company all the activities are organized and there is in the end one person in the hierarchy who has the power and right to make decisions. This person can be the managing director or the owner. Typically, a place marketer has very little

if any influence in the elements of the marketing mix other than marketing communication” (Morgan et al. in Moilanen and Rainisto, 2009, 20).

- **Limited financial resources**

Destinations usually do not have the budgets that commercial companies have to market their products. As Morgan and Pritchard (2004) remark “One corporate giant such as Sony probably spends as much on its annual global advertising budget as the combined totals of most of the world’s national destination organizations” (p. 62). On the other hand, the internet has brought opportunities for those who are creative and know where to find bargains. According to Morgan and Pritchard (2002) “anything that is truly news, or which genuinely gives value to the reader, can usually be sure of a free online ride around the planet” (p. 62).

- **Political pressure**

A commercial company usually makes long term strategic plans for the marketing of its products, but a destination is dependent upon political decision making and the term of office of the government. According to Morgan and Pritchard (2004), this “short-termism of political masters often undermines the building of a destination brand” (p. 63). This is a serious problem because “It has been discovered that the process of developing a country-brand often takes 10 to 20 years” (Moilanen and Rainisto, 2009, 148).

- **The destinations product changes**

Destinations change all the time because of companies within the destination that go bankrupt, new companies that emerge or because of roads, homes and offices that are build or destroyed. Also, “seasonal changes transform the actual product” (Moilanen and Rainisto 2009, 21). Ordinary products do not change in such a way and are therefore easier to market. Related to this is the fact that destinations are not a product but more a service, which is in itself a “weaker foundation for brand development” (Moilanen and Rainisto, 2009, 16).

- **Destinations are not perceived as brands**

Morgan et al. (in Moilanen and Rainisto, 2009) note that places “....have underdeveloped identities and are not perceived as brands by the general public” (p. 4). The idea here is that the complete brand picture is an “assembly” that is “conducted largely by the consumer, not by the producer” (Moilanen and Rainisto

2009, 113). The customer creates a picture in his memory about his holiday experience in a certain place and is not interested in which company exactly created what part of his (brand) experience.

3.7 Successful destination branding

Many destinations engage in a form of branding, but the majority of them does not get much further than a symbol and a positioning slogan. This raises the important question: how can a destination be branded successfully? But before that can be answered we should first take a look at another question: should all destinations engage in branding, or is branding more suitable for certain destinations than for others?

3.7.1 Can all destinations be branded successfully?

In his article *How to Improve the Chances of Successfully Developing and Implementing a Place Brand Strategy*, Van Gelder (2008) gives some good guidelines for successful branding. Although he focuses on place brands, most arguments are valid for destination brands as well. He argues that “places that face intense and increasing competition” (p. 1) are most suitable for branding. “These places are obvious candidates because they need to sharpen their competitive edge to retain or improve their positions” (p. 1). As Moilanen and Rainisto (2009) address, “it is worth starting to build a brand” if “unique product or service features have been created” (p. 13). This means that there needs to be something to offer to tourists before starting a branding process.

It is unclear if places that face a crisis situation are more suitable for branding than others. “Although a place that faces a crisis may become acutely aware of the weaknesses of its brand and decide that it is high time to do something about it, there is little evidence to suggest that crises in themselves are a reason to brand a place” (Van Gelder, 2008, 1). This is because brands take years to develop and because one would overestimate the power of branding saying it could pull a place out of a crisis. However the brand will “provide the context for the solving of the crisis and the brand’s strengths should be applied to the solution” (Van Gelder, 2008, 1). Instead of for places that are in a crisis, branding is more suitable for places that “have lived through a crisis and need to reinvent themselves (Van Gelder 2008, 1).

Van Gelder (2008, 2) also names four preconditions that improve the likelihood of success:

- “Unity: the key stakeholders of the place need to agree to come together to shape its future by developing and implementing a brand strategy.
- Diversity: Places that are more economically, socially, culturally and naturally diverse stand a better chance of developing a strong and effective brand.
- Initiative: Places whose stakeholders already (jointly) undertake (marketing) initiatives.
- Experimentation: there also needs to be a willingness to take risks and a certain tolerance towards failure of experiments.”

3.7.2 When is a destination brand successful?

In order to determine what success factors in destination branding are, we should first agree on what the definition of success in relation to destination branding is and how it should be measured. However, this is according to several authors a difficult topic, for different reasons. Grønhaug and Falkenberg (in Rainisto, 2006) state that “what is meant by ‘success’ is ambiguous, and in most of this literature left undefined...agreement with regard to relevancy and use of the various criteria, is, however, almost nonexistent” (p. 55). According to Rainisto (2006) “in place marketing, it is difficult to determine generally relevant success criteria, as each place has to decide itself what it wants to be in the future” (p. 57). Jensen-Butler (in Rainisto, 2006) argues that “success or failure is strongly related to the city or region itself and its nation-specific factors” (p. 57). According to Ashworth and Voogd (in Rainisto, 2006) the monitoring of effectiveness is no common practice. Another obstacle in determining success is given by Moilanen and Rainisto (2009) who blame the fact that there are relatively few success stories in this discipline.

Unless all these difficulties, there fortunately are definitions of success and descriptions of success stories. According to Rainisto (2006), “success is the fulfilment of some explicit or implicit goal, evaluated with criteria set at a certain time” (p. 54). According to the same author (2006), there are basically two types of goals: concrete and abstract. Common concrete goals in destination marketing are usually a higher number of tourists, higher numbers of overnight stays and

higher tourist receipts. These are relatively easy to measure, but they are marketing goals and give little insight into the success of the destination brand.

Aaker and Joachimsthaler (2000, 17) measure the more abstract success of a brand, which they call the 'brand equity' based on four different factors: the awareness of the target group with the brand, the perceived quality of the brand, associations the target has with the brand and the loyalty of the target group towards the brand. This can be applied to destination brands as well and would be a good start to evaluate the successfulness of a destination brand. This is a very simple model, but a very good way to measure the strength of a brand.

According to Moilanen and Rainisto (2009, 13), "successful brands can satisfy the rational and emotional needs and expectations of the target customers".

Another model that can be used to evaluate the successfulness of a destination brand, comes from Morgan and Pritchard (2002), who developed the 'Destination celebrity matrix' (figure 3.3) which gives a good indication of what a successful destination brand needs to have. On the vertical axis is the 'emotional pull' of a destination. On the horizontal axis is the 'celebrity value' of a destination, which is described as having conversational value, status and being fashionable. Based on its scores, a destination can be placed in the model as either potential star, a celebrity, a loser or a problem place. An advantage of this model is that it is a good way to compare several destinations. Unfortunately, the authors of this model do not explain the techniques that should be used to calculate the emotional pull and the celebrity value. Emotional pull and celebrity value are useful concepts to use when evaluating a destination brand, but the model itself is of limited value.

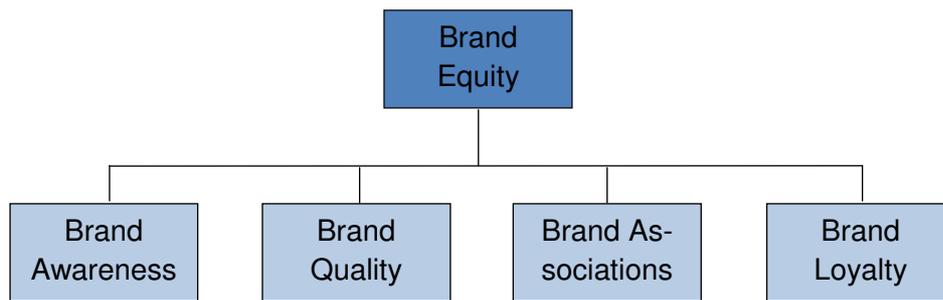


Figure 3.2 Brand equity model

Source: Aaker and Joachimsthaler (2000)

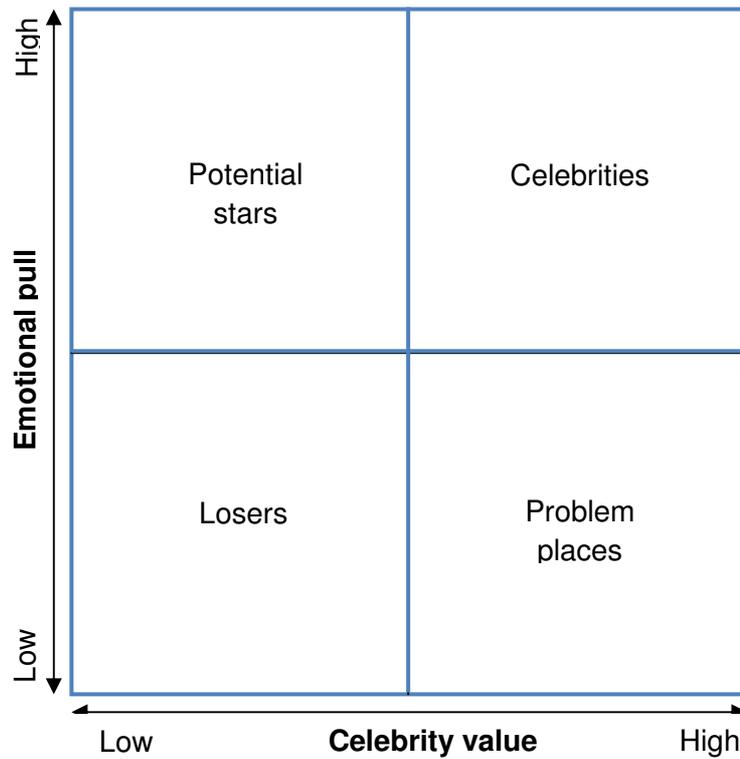


Figure 3.3 The destination celebrity matrix

Source: Morgan et al. (2004)

3.7.3 What are the success factors in destination branding?

This section presents eight factors that can contribute to the building of a successful destination brand. Some of the challenges in destination branding that were presented in section 3.6 could be seen as success factors as well, provided that they are dealt with successfully.

- **Objectivity of the branding team**

The branding of a destination is often initialized by a government and is taken care of by a Destination Marketing Organization (DMO). Both at the political level and at the level of the DMO, the persons involved are usually nationals of the country in question. The advantage of this is that they know their 'product' (the destination) very well, but at the same time they are often too biased to look at their own country from a distance. Anholt (2003) stresses the importance of objectivity of the branding team: "A lack of objectivity can be fatal to the proper branding of a country no matter how good the intentions at the start" (p. 137).

- **Public private partnerships and committed stakeholders**

One of the first steps in the branding process is to get important stakeholders involved with the project. These stakeholders could be airlines, transport companies, hotel chains, major attractions, local tourist boards, etc. This principle is called public-private partnerships (PPPs). According to Pike (in Moilanen and Rainisto, 2009) these PPPs are a relatively new phenomenon, as historically DMO's were established as "government departments or industry associations" (p. 116). The use of these PPPs is nowadays of crucial importance for several reasons:

- Private companies can contribute financially to the project.
- If the destination brand is endorsed by well-known national companies, the brand and the branding project become more credible and are taken more seriously by the domestic public, politicians and other national companies. This can create momentum for the project which can bring it from the managers desks into the public sphere. This view is supported by Moilanen and Rainisto (2009) who state that "the more national stakeholders can be persuaded to use the national brand in their own marketing communications the greater the impact for the country" (p. 52).

- The endorsement by national companies creates trustworthiness among the international target group and creates visibility for the brand.
- The private partners should not only endorse the brand, they should also be part of the planning process. It will be very hard to get their permission afterwards, when the brand has already been established. (Moilanen and Rainisto, 2009).
- The involvement of private parties can result in the use of companies' professional networks, the introduction of marketing knowledge and of other practices that are more common in the business world.

When the branding process has started, it is important to keep all partners involved and committed to the project. A case study about Scotland suggests that especially in the early years, when success is not so visible yet, this is very important. Private companies are used to work for quick results and should therefore be informed continuously about the benefit of the brand. (Moilanen and Rainisto, 2009).

- **Clear decision making structure**

In many cases, and partly as a result from PPPs, more than one organisation is to a certain degree responsible for a destination brand. A ministry of tourism or economic affairs often sets the strategic goal of promoting tourism. This task is then passed on to a national tourism board, which can in turn hire an external agency to develop a creative campaign. If the destination branding campaign is part of a larger place branding campaign, the responsibilities for the result could be shared with other government agencies, such as those responsible for export promotion or attracting Foreign Direct Investment (FDI). This complicated structure and the fact that the brand is 'owned' by several stakeholders, can result in a nightmare when it comes to decision making. Therefore, "the decision-making process must be crystal clear at an early stage. In the end, who is responsible for the decision about the brand?" (Moilanen and Rainisto, 2009, 44).

- **Approval from the public**

Several authors (Moilanen and Rainisto, 2009; Morgan et al., 2004; Szondi, 2007) stress the importance of the domestic public's approval for the branding project and for the chosen brand positioning. This has various reasons:

Destination branding projects are often (partly) funded with taxpayers' money. To avoid criticism that money is thrown away, the brand managers should clearly explain what the purpose of the brand is and what it can bring to the country. According to Szondi (2007) the public "should first be explained the context and relevance of the project, well before launching any campaigns" (p. 19). Here too, PPPs can help to show the public that the brand is not another government project, but that private parties believe in its potential too.

A country brand, and to a lesser extent a destination brand, has a very emotional meaning to the citizens of the country. Therefore, they should have input in the planning process and the brand managers should make sure that citizens feel comfortable with the brand and the brand positioning that the destination uses to position itself (Moilanen and Rainisto, 2009). Not only should the public feel comfortable with the brand, in the ideal situation they are the brand ambassadors and should 'live the brand'. This goes much further than giving approval, but is about understanding what the brand stands for and knowing how they can communicate the brand to visitors or to friends abroad.

- **Long term political commitment, financial support and planning**

It happens all too often that a minister or a government institute initiates a branding campaign, hoping for some quick results. But when a new government is chosen or when the budgets are redistributed, the branding campaign can suddenly lose half its funding and the project slowly extinguishes like a candle. It should be realised from the beginning that branding a destination is a long term exercise, which, according to Moilanen and Rainisto (2009) "transcends the life of one democratically elected government's term of office" (p. 51).

Therefore, two factors are crucial for the survival of the project: Long-term political commitment and long-term funding. The schedule for the project should not only cover the implementation of the brand but also the years following on that, which also includes proper evaluation procedures. The funding should be structural and, as said before, guaranteed for a longer period. According to Moilanen and Rainisto (2009), "core public sector funding (usually from the central government) is almost always essential. This is true not just in the start-up stage, but, for most countries, it is also likely to be critical to the ongoing survival of the nation brand" (p. 53).

- **Creativity and the use of public relations**

As a “lack of financial and human resources” is a common problem in destination branding, creativity and innovation are essential (Szondi, 2007, 19). According to Szondi (2007, 19) it is also important to use the appropriate communication tools. He argues that “advertising is successful and effective at the early stage when the brand is launched”, but that it “is expensive on-way communication and not credible in the long term”. Instead of using advertising, “more reliance on two-way public relations should be involved in order to build and maintain relationships and dynamism” (Szondi, 2007, 19). Another factor that is related to this is the advice from Moilanen and Rainisto (2009, 53) to keep things simple: “It is usually wiser and more effective to build on existing knowledge than to reinvent the wheel.”

- **Customer and market research**

Several authors stress the importance of customer and market research. Moilanen and Rainisto (2009, 51) state that: “Customer research is essential: to market a country without understanding how existing and potential customers view the country, its products and services, it to live in a fool’s paradise. To ignore consumer perceptions is a recipe for failure.” According to McCleary (in Konečnik, 2004, 309) “destination marketers should be aware of their own and their competitors’ perceived strengths and weaknesses.”

- **A good brand management team**

As in any professional project, the success of the destination brand depends heavily on the skills of the brand manager and his or her team. According to Moilanen and Rainisto (2009, 42) “an important factor for success is the skill ‘to make the caravan move’ i.e., the skill to build up momentum for brand building.” Apart from special management skills there are also more obvious factors, that are nevertheless of crucial importance, such as qualified personal, a stable team, etc.

4 THE CASE OF SLOVENIA

4.1 Tourism in Slovenia

Before its independence from Yugoslavia in 1991, Slovenia was a flourishing tourist destination. In 1985, the country (at that time still part of Yugoslavia) received just over two million foreign visitors a year. This figure dropped with 5,8% in 1990 and collapsed completely in the following years. In 1995, Slovenia received 732.103 foreign visitors, which was a 63,5% decrease since 1985. This huge decline is probably partly due to the Ten-Day War of 1991 between Slovenia and Yugoslavia. Slovenia had since then not been part of the armed conflict anymore, but the war in the region lasted until 2002. From 1995 on, tourism has been growing steadily, but in 2008 the amount of foreign visitors was still 11,6% below the level of 1985. (All figures from Slovenian Tourist Board, 2008). See the appendix for more figures on tourism in Slovenia.

Slovenia certainly has something to offer to tourists. The country is small, but hosts a great variety of landscapes. Below is a non-complete overview of some things Slovenia has to offer to tourists:

- The Julian Alps, with possibilities for skiing, hiking, biking and adventurous sports such as rafting and canoeing. The highest peak is 2864 meters. Lake Bled and Lake Bohinj are two beautiful blue mountain lakes.
- The Mediterranean coast (only 47 kilometers) with the medieval towns of Piran, Izola and Koper.
- The Karst, an area of limestone caves, many of them open to the public.
- Thermal spas and health resorts in the east of the country.
- Lively old cities and towns such as the capital Ljubljana, Maribor and Ptuj.



Figure 4.1 Map of Slovenia with most important tourism offer

Source: CIA World fact book (2009)

4.2 Competition

The competition for a tourism destination is extremely varied and therefore it is hard to give any general statement about the competition Slovenia faces. It depends upon many factors why a tourist visits a certain destination instead of another. These are very personal factors, that can greatly differ. Moreover, different regions and different types of holidays can have very different competitors. The Slovenian Alps for example, have to compete with France, Italy, Switzerland and Austria, but may even have to compete with the Rocky mountains in Canada or a Finnish ski resort. The coastal district of Slovenia faces competition from any Mediterranean coasts, but could even face competition from a beach in Thailand or from a Dutch island in the Wadden Sea. Obviously, most competition is felt from neighbouring countries, especially Croatia, but here too some remarks should be placed. A visitor to Croatia might make a sight trip to Slovenia, whereas he would have never considered to make a complete trip just to Slovenia. In this case, Croatia is not a competitor but a welcome supplier of tourists.

4.3 The Slovenian Tourist Board

The Slovenian Tourist Board, which is an institution that operates within the Ministry of the Economy's area of activity was established on the 21th of November 1995 and is the major national tourist organization. One of the main tasks of the STB is the planning and implementation of projects to promote the country as a tourist destination. "The STB would like to position Slovenia as a clearly and easily recognizable tourist destination with precisely determined comparative and competitive advantages which will definitely contribute to the marketing of the Slovenian tourist offer" (Slovenian Tourist Board, 2009).

The Slovenian Ministry of the Economy (2006) identifies three main foreign target markets for attracting tourism:

1. Regions of neighbouring countries within a 2-hour driving distance
2. Markets on which affordable and fast connections are established (planes, fast boats and trains)
3. The rest of Europe as a continent and other continents

In the marketing objectives for tourism (Ministry of the Economy, 2006), there is a difference between the improvement of the actual tourist product (e.g. improvements in the level of quality of products and services) and improvements in the image. Some examples of the last category are:

- Increased recognisability of Slovenia
- Breaking of stereotypes about the country
- The reach of national consensus on national and destination symbols.
Three internationally recognisable national symbols should developed

The Ministry of the Economy (2006) states that: "To understand the marketing objectives of Slovene tourism, a pyramid diagram has been used in which a tourist may be considered in relation to a destination" (p. 56). This pyramid is represented in figure 4.2. The marketing efforts are focussed on moving the (potential) tourists up in the pyramid, step by step. There is a different focus for every target group: Within target group one, the focus is on increasing the desire to visit and on "reminding those who have already been to Slovenia of the destination and attract them as regular guests" (p. 57). In target group two, the focus is on creating a desire to visit and on creating a positive experience for

actual visitors. Within the other markets (target group three), the focus is first of all on creating recognisability and acceptability. For actual visitors a positive experience should be created.



Figure 4.2 Marketing obj. of STB: tourist in relation to the destination

Source: Slovenian Ministry of the Economy (2006)

4.4 Previous campaigns for Slovenian tourism

Ever since its independence in 1991, Slovenia has run several promotional campaigns to attract foreign tourists. Examples of positioning slogans used in these campaigns are 'On the sunny side of the Alps' and 'The green piece of Europe'. A campaign with the name 'Slovenia Invigorates' was run in Germany, Italy and Austria after Slovenia's accession to the EU in 2004. 'On the sunny side of the Alps', was a campaign that started in the early eighties and the slogan lasted for over a decade. According to Klančnik (personal communication, 26 May 2009), who is the director of the Slovenian Tourist Office in the Benelux, "that was tremendously effective, beautiful, romantic, lovely and also showed our geographic position in Europe". He believes the reason for the successfulness of the slogan was that it differentiated Slovenia from other Yugoslavian republics in a time that Slovenia was still part of Yugoslavia, which made the campaign also incredibly popular among the Slovenian public.

Klančnik (personal communication, 26 May 2009) also comments on other campaigns: "We tried with other slogans, other brands, but we never succeeded with any, because our attempts were not prepared well enough. There were more

campaigns, some of them successful, some not, but all marketing and not branding campaigns... All attempts to establish the brand so far have failed completely.” This view is supported by Konečnik (personal communication, 7 May 2009), assistant professor in the marketing department of the Faculty of Economics at the University of Ljubljana, who contributes that most of these campaigns were too much focussed on functional benefits.

4.5 The importance of a destination brand for Slovenia

There are many reasons why a destination brand is important for Slovenia and why the ‘I feel Slovenia’ brand was developed:

- According to Konečnik (2006b) “Tourism is one of the most promising sectors of the economy in Slovenia.” Also, Slovenia receives plenty of positive references in tourism magazines, for example by Tourism review online magazine (2009): “With so much diversity in such a small area, Slovenia makes an ideal holiday or short break and literally has something for everyone.” The fact that the amount of incoming foreign tourists is still behind the level of 1985, suggests that Slovenia at least has the potential to attract more tourists.
- All the interviewed experts agree that previous campaigns were not able anymore to help Slovenia to reach its goals. They had been targeted for example on differentiating Slovenia from other Yugoslavian republics or on bringing Slovenia into the EU. When these goals were accomplished, there were new ones that were to be fulfilled. Moreover, according to Konečnik (personal communication, 7 May 2009), there was a need not only to promote tourism in Slovenia, but also other industries, exports, culture, sports and so on. Therefore, not just a destination brand, but a country brand had to be established.
- Slovenia has to compete with many ‘new’ European countries for a certain image of its tourist destination. “Since the fall of the Berlin Wall and the collapse of the Soviet Union, 28 countries have emerged out of the eight former communist countries in Central and Eastern Europe” (Szondi 2007, 8), which is a reason that competition has increased. Even though a certain image of one of these destinations does not prevent other

destinations from having the same image, these 'new' destinations have to fight for a certain positioning.

- The Ministry of the Economy (2006) states in its *Development Plan and Policies of Slovene Tourism 2007-2011* that there is “poor recognisability of Slovenia as a country and destination beyond the neighboring regions”. There is “low acceptability due to ignorance and stereotypes stemming from Slovenia’s location in Eastern Europe and the Balkans” and there is “a tendency to confuse Slovenia with Slovakia”. Furthermore, “Slovenia has no national symbols recognized abroad, such as towns, natural, cultural and other attractions, brands national dishes or drinks”.
- In a personal interview (7 May 2009), Ms. Konečnik explained me that “The reality in Slovenia is much better than the average perspective of people who do not know Slovenia.” If a destination is not perceived as good as it actually is, branding is a good tool to narrow this gap. Konečnik (2004b, 308) also states this opinion in an article in *The Journal of Brand Management*: “Not only the author of this paper, but also many other authors involved in research into branding destinations, believe Slovenia is one country that should work seriously towards building a modern destination brand.
- Mr. Kek (personal communication, 7 May 2009), who is the brand manager of the ‘I feel Slovenia’ brand, also gave as a reason for engaging in branding that Slovenia has a flag and a coat of arms that are not very recognisable and positioning abroad, so that there had always been a need for an additional symbol that could be used for promotional usage and could co-exist with the formal state symbols.
- According to Konečnik (personal communication, 7 May 2009) it was just time for a new brand, also because the theory on branding had developed a lot in the last ten years. There was a general feeling of “we should have it, it is interesting.”
- Last but not least: the circumstances were there to start with a brand. The ‘I feel Slovenia’ slogan was developed without the purpose of becoming a country brand. But “because we thought it was a nice idea, we started to put it on T-shirts and caps. Then, the prime minister saw it and he liked it so it was publicised in some news papers.” (Kek, personal communication, 7 May 2009). Klančnik (personal communication, 26 May

2009) adds: “When we saw that the great majority, in tourism, in industry, sports and culture would embrace I feel Slovenia, with love in the name, we said, let’s go for it.”

4.6 The establishment of the I feel Slovenia brand

The Ministry of the Economy was given a budget of €200.000 for the project to create a brand that would represent Slovenia abroad. The ministry hired a big Slovenian full range communication agency, that in turn included some external experts to be part of a planning group, among them Ms. Konečnik and Mr. Klančnik. The identity could not be developed from the bottom up, because a brand name/slogan was already decided upon more or less. This was the name/slogan ‘I feel Slovenia’ (with the letters l-o-v-e printed in bold). This slogan was developed by a designer that worked for the Government Communication Office, but not with the intention of changing that name/slogan into a brand.

The planning group used a three step process to develop a brand identity for this brand. The first step was an open ended questionnaire (Delphi method), among 30 high ranked representatives from key areas, such as experts within the economy, tourism, culture, etc. Fortunately, their ideas for the brand were quite similar. The second step in the process was another questionnaire among some 700 other representatives from the same key areas. In step three selected members of the Slovenian public were asked for their opinion on the brand. The planning group also received enormous amounts spontaneous feedback and other ideas for the brand. Based on all these results a brand identity (see figure 5.1) was developed, including a logo (see figure 5.2).

The ‘I feel Slovenia’ brand is very well described in *The Brand of Slovenia* (Slovenian Ministry of the Economy, 2007), which is the brand manual of the ‘I feel Slovenia’ brand. See the appendix for a description of the brand, derived from this manual.

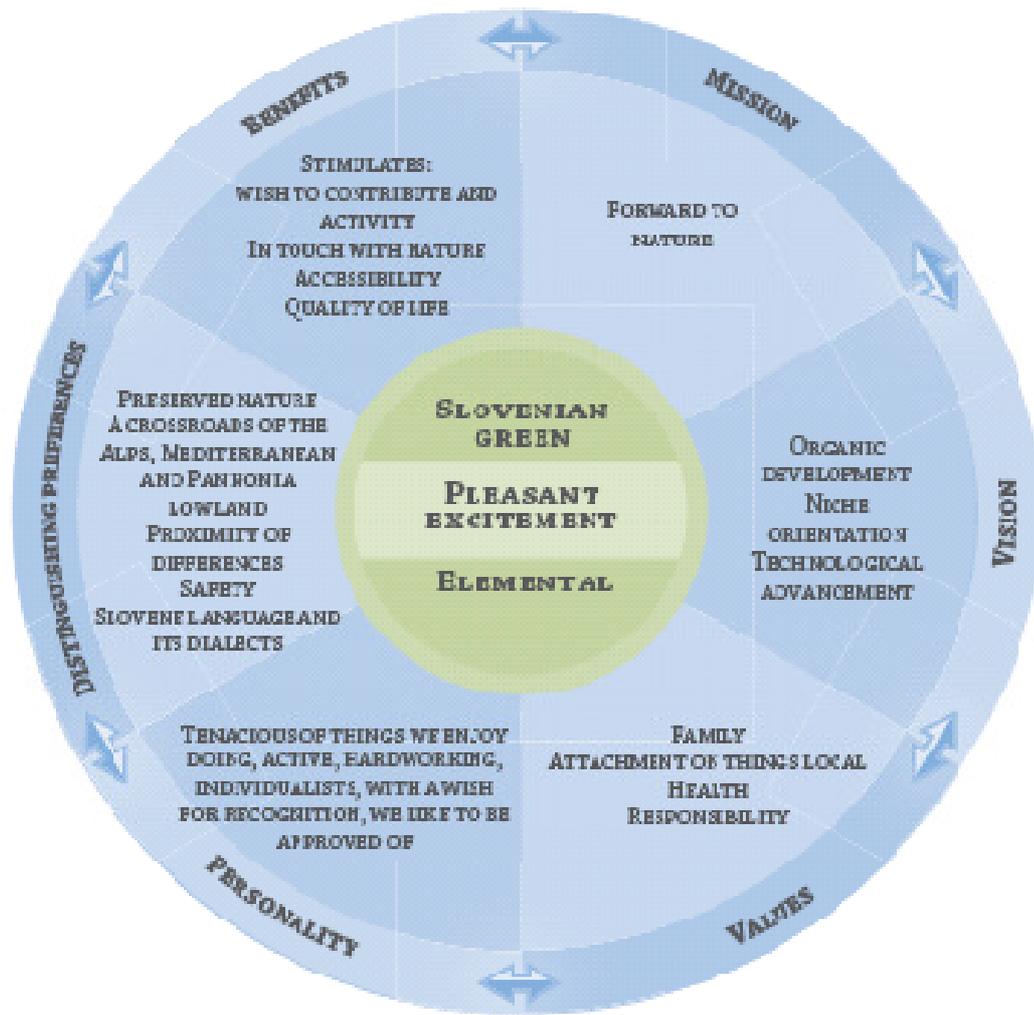


Figure 4.3 Slovenia's brand identity

Source: Slovenian Ministry of the Economy (2007)



Figure 4.4 I feel Slovenia logo

Source: Slovenian Ministry of the Economy (2007)

4.7 Communicating the 'I feel Slovenia' brand

After the brand was created, the project was passed on from the Ministry of the Economy to the Government Communication Office. One of the reasons for this was that according to Konečnik (personal communication, 7 May 2008) "we did not want to give the official brand management function to the Slovenian Tourism Board." Even though the STB wanted to have this role, it was not given to them because other stakeholders would feel that this would again become a tourism brand.

The creation of the brand had just finished before the start of the Slovenian presidency of the European Council in the first six months of 2008. Mr. Kek had been working on the preparations of the communication around this presidency, but as he had no further role during the presidency itself, he was appointed brand manager for the 'I feel Slovenia' brand. He started with the preparation of a communication plan for one-year. After this was approved by the government he received a budget of €375.000,- for one year.

The presidency of the European Council placed the GCO for a great dilemma: All the international attention for Slovenia would create the perfect opportunity to present the brand, but it just came a little bit too early. There was already a logo created for the presidency and according to Mr. Kek (personal communication, 7 May 2009) "You never use two strong brands at the same time". Therefore, the choice was made not to launch the 'I feel Slovenia' brand internationally yet, but only communicate about it domestically. The GCO started with spreading a leaflet about the brand to every household in Slovenia to inform and motivate the domestic public about the brand. Through a contest, people were also asked to share their feedback on the brand. The campaign was strengthened by outdoor advertisements for the brand. Although the brand was not launched in relation to the European Council presidency yet, Mr. Klančnik (personal communication, 26 May 2009) told that the brand was first used in tourism during the World Travel Market in London in November 2007 and in January 2008 also on the Benelux market.

At the same time, the GCO started with finding partners for the promotional usage of the brand. "That means that if you have a fair, a press conference, an event, or if you do a congress and so on, you can use it Last year there were

more than hundred positive submissions” (Kek, personal communication, 7 May 2009).

For the commercial usage of the brand, through both full branding and co-branding, the GCO developed a set of rules together with a lawyer. The Slovenian Tourist Board is licensed for two years to sell certain items under the ‘I feel Slovenia’ brand name, such as a caps, umbrellas, memory sticks, etc. In the field of co-branding, the STB is currently also the only organisation that is allowed to use the brand. The initial goal was to find many more partners to use the brand, as is also stated on the official website of Slovenia: “I feel Slovenia’ is Slovenia’s first overall brand, which will be used consistently and systematically across the government sector, by non-governmental and business organisations, and various associations and individuals in the next few years to promote themselves to foreign visitors, investors and partners in the fields of culture and science, and at international sports events” (Republic of Slovenia: Official gateway to the information on Slovenia, n.d.).

Now the introduction phase of the brand is finished, the GCO is working on further expansion of the brand and finding new partners. In the meantime, the STB is using the brand in all its communications, which gives the brand the so important visibility.

5 RESULTS, ANALYSIS AND CONCLUSIONS

In order to come to a conclusion and an answer to the problem definition, which will be presented in section 5.3, first, the branding process (section 5.1) and the brand equity of the 'I feel Slovenia' brand (section 5.2) are evaluated.

5.1 Results and analysis of the branding process

In the theoretical framework many challenges and success factors in destination branding were addressed. Furthermore, criticism on the practice, the relationship between destination branding and country branding, and between branding and promotion were discussed. The theories that are most important and relevant for the case of Slovenia are applied to the 'I feel Slovenia' brand, based on the expert interviews.

5.1.1 How valid were the motifs for developing a brand?

section 3.7.1 of the theoretical framework contained a discussion about what places are most suitable for branding. One of the conclusions was that places that have lived through a crisis are good candidates to be branded. Slovenia certainly lived through a crisis as it got independent from Yugoslavia and changed from a socialist republic into a market economy. The theory also named unity, diversity, initiative and experimentation as factors that contribute to a successful destination branding process. It would require more knowledge about the country to judge on its unity and its diversity, which is the reason that they will not be evaluated. Initiative is highly present in Slovenia, as stakeholders in tourism have been taking marketing initiatives together already before the independence of the country. The same counts for 'experimentation', which is evident from the amount of previous campaigns Slovenia has ran already and the willingness to learn from these campaigns. Probably the most valid reason for starting a branding process, is that the reality in Slovenia is much better than many people believe (see also section 4.4). This gives branding the opportunity to close the gap between image and identity and not just to fall into perception management. Therefore, the conclusion is that Slovenia had very valid reasons to engage in country and destination branding.

5.1.2 How well was the process of branding done?

In the case of 'I feel Slovenia' the creating of a brand identity did not make a very good start. Konečnik (personal communication, 7 May 2009) was at first very skeptical when asked to participate in an expert group that would form a branding team, as she believed a brand identity should not be developed around a slogan that has already been agreed upon beforehand. This criticism towards the start of the project is also supported by Kek (personal communication, 7 May 2009), who states that "you do not develop a brand from a slogan, but this should be the result of the brand, what you see in the end." There was also the fear of Konečnik (personal communication, 7 May 2009) that key stakeholders would not be willing to participate in any planning sessions and discussions anymore as this was not the first attempt to get all the stakeholders together. But fortunately this was not the case as the stakeholders gave very positive and constructive feedback and were willing to participate.

Although the basis for forming a brand identity were, at least from a theoretical perspective, not very good, the brand identity was very well constructed. The three step process that was discussed in section 4.4 proved to be successful. According to Klančnik (personal communication, 26 May 2009) almost all stakeholders could identify with the brand, and he adds that "if somebody does not like it, well, let them not use it". About the branding process he comments: "It was done right in time, just in time and I say thank God that we managed it." Furthermore, he adds that "if 'I feel Slovenia' would have been treated in the same way as all the other campaigns, it would have failed before launching...You would have lost another five years, a lot of money and everything."

Another positive aspect is that a lot of effort was made to seek approval from the Slovenian public. According to Kek (personal communication, 7 May 2009), some 6900 Slovenians responded to a leaflet in which the opinion of the public was asked.

So, how was the process of branding done? It was certainly not always done by the book, but important theories on brand identity and brand image were applied and all the key stakeholders, including the Slovenian public were included.

5.1.3 How well is the brand managed and is a vibe created around the brand?

The lack of financial resources for managing the brand (which is done by the GCO) is evident. Currently, Mr. Kek is the only one at the GCO working on the brand, with just 33% of his time and with the restriction of having no budget for the project this year. According to Konečnik (personal communication, 7 May 2009), there should be at least one person who works fulltime on the brand. Furthermore, she comments that “not enough work has been done to develop or to present the brand”.

Kek (personal communication, 7 May 2009) explains why it is so difficult to manage the brand in the right way: “Over the night we were given this assignment and we suddenly had to present a plan for 2008, but we had no time and we did not know what to do... It was not in time frame and not in a resources frame, and we did not start off with a strategy. So theoretically, from the early beginning, nothing was done right.”

Even with small resources it should be possible to develop the brand, as long as there is interest and enthusiasm for the project. When the brand identity was developed there certainly was enthusiasm, as was also stated by Konečnik. Kek (personal communication, 7 May 2009) answers to the question if there is any interest in Slovenia for the project: “It used to be, last year. That was due to the mailing we send to Slovenians and through the efforts of the STB. But this year, there is no interest in the brand. No interest at all.”

A very positive point in the brand management is the way in which the brand book is developed and used. No adjustments can be made to neither the content nor the visual parts of the brand. Translations of the slogan are not allowed, with one exception for the Russian market. This consistency is also visible in the style of the brochures, the promotional giveaways and to a lesser extend in the website of the STB. There is some room however for local adaptations, as sub baselines are used in addition to the logo. These support a certain theme that lasts for a year. For the theme ‘Slovenia adventure’ the sub baseline ‘Feel the wind of adventure. Taste the energy of the moment’ is used, which may be translated for a local market. Klančnik (personal communication, 26 May 2009) states about the brand guidelines: “This is the bible, and I stick to it”. It is probably

the dream of every brand manager that a user of the brand thinks about it in this way.

The conclusion is that the brand is not managed very well at the moment and that the project is clearly missing visibility and interest. The vibe around the project has slowly vanished. However, this does not automatically mean that the responsible brand manager is to blame as a lack of financial and human resources certainly play a role (also see section 5.1.8).

5.1.4 How well are the brand values translated into communication messages?

Klančnik (personal communication, 26 May 2009), as the director of the Slovenian Tourist Office in the Benelux explains that he uses about 20% of his budget on PR, 20% on advertising and 60% on sales support, including event management. This is not equally divided over the year, as advertising and sales support are mainly done in the first half of the year, whereas PR goes on year round. Sales support consists of the presence on events for both the trade and the consumer markets, presentations, workshops and so on.

Examples of advertisings that were used are a banner on Zaventem airport in Brussels and the sponsorship of a golf tournament. Combined advertising, for example with a tour operator, in which both parties pay 50% of the advertisement, “has shown to be fantastic” (Klančnik, personal communication, 26 May 2009). Although the STO Benelux does have some budget for advertisements, they are very reserved with the use of advertising, “because we are still short of the very professionally designed, targeted ads that would target certain specific groups, for example golfers or hunters” (Klančnik, personal communication, 26 May 2009).

According to Klančnik (personal communication, 26 May 2009), the use of PR is much easier than good advertising. Although he tries to incorporate the brand values into every PR message, he is also very cautious about these values becoming annoying in messages. Especially the word ‘love’ is used “gently but constantly. We do not want people to feel sick about it. We do not want to saturate them with this message” (Klančnik, personal communication, 26 May 2009). The use of the logo by third parties in free publicity is most welcome, but never demanded.

Based on Klančnik's comments, the conclusion is that the brand values are constantly considered and used in communication messages. This is not only done through the use of the logo in advertising, but also in sales support and in PR.

5.1.5 How well does the country brand fit the interests of the tourism industry?

Section 3.2 of the theoretical framework contained a discussion on the relationship between country branding and the more specific concept of destination branding. Conclusion of that discussion was that in the ideal situation one brand is used for the entire place, but that there is always the risk that one party feels limited or that the brand becomes too general. Also, country branding is said to be very (if not too) challenging for various reasons. The 'I feel Slovenia' brand gives an interesting contribution to that discussion.

The 'I feel Slovenia' brand was created as a country brand, that would not only represent tourism, but also the Slovenian industry, the cultural sector and the sports world. However, currently, the brand is almost exclusively visible as a destination brand. This is partly due to the fact that the tourism sector and especially the STB are more used to undertake joined promotions, than the other industry, the cultural sector and the sports world. Also, this indicates how difficult it is to create a country brand.

The theory also made clear that a country brand could limit the tourism industry in the message that it wants to send. Klančnik (personal communication, 26 May 2009) is very clear about the fact that the country brand 'I feel Slovenia' does not limit the possibilities for destination branding: "I honestly claim that we have not felt any rigid limitation in tourism." Moreover: "Frankly and very sincerely, we have never felt that this brand would limit us in any way. For the tourism purposes it is beautiful" Klančnik suggests that certain industry sectors (e.g. chemistry, pharmaceuticals) are the only stakeholders that might feel a little bit limited in the use of the brand.

In the case in of Slovenia and from the perspective of the tourism industry, the fact that 'I feel Slovenia' is a country brand does not limit their possibilities for the usage of the brand. Although 'I feel Slovenia' is officially a country brand, it

comes in practice closer to a destination brand, which might be a reason that the Slovenian Tourist Board does not feel any limitations in using it.

5.1.6 How beneficial is the 'I feel Slovenia' brand over promotion?

As was explained before, Slovenia tried many slogans, logo's and campaigns since the early eighties. Klančnik (personal communication, 26 May 2009) comments on other campaigns: "We tried with other slogans, other brands, but we never succeed with any, because our attempts were not prepared well enough. There were more campaigns, some of them successful, some not, but all marketing, and not branding campaigns...All attempts to establish the brand so far have failed completely."

Both Konečnik and Klančnik strongly believe that branding has the future when it comes to the promotion of destinations. Klančnik (personal communication, 26 May 2009) uses the metaphor of building a house to explain when destinations should engage in branding: "If you don't have the basement, you cannot built the house. And branding is the fourth or the fifth floor of that house. If you don't have the cellar and good fundamentals, don't go building the first floor." In this case the fundamentals are a well established tourism board, connections and partnerships with stakeholders and skills and knowledge of marketing and branding.

According to Konečnik (personal communication, 7 May 2009), promotion or marketing is just short term oriented. Branding is a long term process in which you have to follow the steps strategically. She states that it is certainly easier to promote or market a destination than to brand it.

The Slovenian Tourist Board enthusiastically started to use the brand from day one on and they still use it in all their communication messages. They are not obliged to do so, so the fact that they do make use of the brand proves the benefit to them of using the brand instead of using other promotional campaigns.

5.1.7 How did the public respond to the brand and the branding process?

Konečnik (personal communication, 7 May 2009) knows about the discussions on criticism on branding in the literature, but sees no problem in practice in branding Slovenia: "I think it is more the idea on the academic level". She also explains that most ordinarily people and even important representatives still do not really know what a brand is about. Furthermore, she thinks that people are capable of

thinking about a destination as a brand, but that they probably just do not realise that a destination is a brand in a sense.

When the Slovenian people were asked about their opinion on the 'I feel Slovenia' brand, they did not state any complaints about the idea of a country or a destination brand. Kek (personal communication, 7 May 2009): "We received the opinions of about 6900 Slovenians. The majority of the complainers said: 'Why is it in English?', and another part complained about the colour of the logo. But the branding project itself was not questioned." According to Konečnik (personal communication, 7 May 2009) the brand "was extremely well excepted" by the Slovenian people.

The absence of any criticism on the project is very remarkable as the theoretical discussion in section 3.4 showed that this can be a serious obstacle in branding. This is a very positive finding for any country or destination that wants to engage in branding.

5.1.8 What were the main challenges and what should be improved?

Below is a list of six factors that are currently regarded as challenges by the people involved in the 'I feel Slovenia' brand project.

- **Political and financial support for the brand**

The former government invested in the development of the project and reserved some funds for the introduction of the brand. However, when a new government took over the enthusiasm for the project faded. Kek (personal communication, 7 May 2009) "noticed that the ministers were a little bit reserved when you mentioned 'I feel Slovenia' because they treated it as a political heritage of the former government. They did not say anything but they did not want to deal with that." As a result, there is currently no long term funding for the brand management. There was zero budget for this year, but Mr. Kek hopes to receive some for next year.

The STB is more stable in that sense as they receive about 80% of their budget from the central government. The other 20% comes from other sources, such as from participants to fairs. Although Klančnik (personal communication, 26 May 2009) states that "the main challenge is actually money", he also comments that there is enough money available to do some advertising.

The fact that the brand is currently underfunded is a serious challenge and a potentially dangerous situation for the survival of the brand. The importance of political and financial support for a long period was also stressed in the theoretical framework and from the case of Slovenia it is even more evident how serious and important this issue is.

- **Long term planning and evaluation criteria**

The lack of political and financial support also results in a lack of long term planning. As long as the future of the brand is not guaranteed for more than a year, no long term plans will be made either probably. The fact that there is no long term strategy is a serious threat to the brand. According to Klančnik (personal communication, 26 May 2009) “more than creativeness, more challenging is of course the time, because the brand of a destination may only be established through at least ten, twenty, thirty years.”

Related to the absence of such a plan is the fact that no evaluation criteria or clear goals are set for the brand. According to Kek (personal communication, 7 May 2009), “there was no plan for after the introduction of the brand.” A result of this is that the brand is in danger of getting into a downward vicious circle, because political and financial support are needed for a long term plan with evaluation criteria, but without such a plan chances are small that the brand will receive government priority and appropriate funding.

- **Public private partnerships**

A lot of work has been done to make public private partnerships (PPPs) actually possible. There are basically three different kinds of partnerships that organisations can have with the ‘I feel Slovenia’ brand: only promotional usage of the brand, co-branding and full branding. Together with a lawyer a set of rules for the use of the logo was developed, so the basis is rather good. However, at this moment very few partnerships have been created. The logo was used by many partners for promotional usage, but currently the only stakeholder that makes use of the brand (both by full branding and co-branding) is the STB. Mr. Kek (personal communication, 7 May 2009) acknowledges that more should be done to create partnerships, but that there are just so many more other things to do. Nevertheless, he does believe that there is a lot of interest for co-branding, especially among the smaller companies in the tourism industry. He is currently

working on standardising this procedure, but as said before, a lack of time is a serious issue.

- **Target groups**

Konečnik (e.g. 2004b) researched the image of Slovenia as a tourism destination among both potential visitors and professionals in the tourism industry. As she was part of the planning group, her research was also used in developing the brand. Furthermore, there are market profiles of key European markets available on the website of the STB and the Slovenian Ministry of the Economy (2006) published a document in which three different target groups are roughly defined (which was discussed in section 4.2.). However, according to Kek (personal communication, 7 May 2009) “officially, the target markets (of the brand) are not decided upon anywhere. It’s according to what we think, feel and believe.” These two point of view are quite differing, but both valid. Certainly, a lot of market research has been done in the area of tourism, but the brand itself “lacks a strategic approach” when it comes to target groups (Kek, personal communication, 7 May 2009).

As the brand is not developed for mass communication but rather to reach niche groups, the lack of clear decided upon target groups is indeed a challenge. This was earlier acknowledged by Klančnik (personal communication 26 May 2009), who claims to be better able to design advertisements for niche target groups if these groups were better analysed.

- **Design of the logo**

From all the expert interviews it became evident that the ‘I feel Slovenia’ logo is still a topic of discussion. Klančnik (personal communication, 26 May 2009) states that he loves the message of the brand, but “a bit less I love the visual of it”. Kek (personal communication, 7 May 2009) agrees that “the logo is a little bit problematic”. The main problem is that the logo does not tell the story of the brand and that there is discussion about the colour. This was also stated by Kek in an evaluation report of the brand to the government, with the remark that adjustments to the logo could only be made after the seeking of expert advice. “But there is no money available, so it will for now stay as it is. Maybe in a year we will evaluate how it was implemented and if small adjustments to the design are necessary” (Kek, personal communication, 7 May 2009).

- **Lack of recognizable symbols**

One of the proposed measurements in the Slovenian Ministry of the Economy's. (2006) *Development Plan and Policies of Slovene Tourism 2007-2011* was to do something about the non existence of internationally recognized Slovenian symbols: "Developing key symbols making Slovenia recognizable and integrating these symbols into the umbrella promotion and marketing of Slovene tourism" (p. 59).

This measure was suggested, as one of the main challenges Slovenia is facing in its promotion is that it currently has a weak image as a country and as a tourism destination. The image is not negative, it is just that "people do not know exactly what to think of" (Konečnik, personal communication, 7 May 2009). Klančnik (personal communication, 26 May 2009), when asked about the challenges he faces in promoting Slovenia as a tourism destination, answered that "the lack of knowhow of Slovenia as a tourism destination" is a serious challenge. The branding process that was started certainly is a good start to improve the image, but as the brand logo is not a very recognized symbol either, the problem of no Slovenian symbol remains.

5.1.9 Successfulness in general of the 'I feel Slovenia' brand project

Konečnik (personal communication, 7 May 2009) comments on the brand building process: "I think that now, we are on the right way". "I cannot say that this is a successful story until now, because we have only been working on this for one and a half years." The signs are positive however: "All the bases for developing a brand are well done and well set" and "this brand is the first one that really has potential." Furthermore, Konečnik comments that "the brand is well perceived, so it has the potential to last longer."

Klančnik (personal communication, 26 May 2009) states about the brand: "It has shown much more efficiency and effectiveness than just any other brand after 1996."

These rather positive comments on the brand project are right and I agree that the brand is promising and has great potential. However, it should not be forgotten how many challenges there are still on the road and that the success of the branding project in the end depends upon the success of the brand itself.

5.1.10 What can others learn from the experiences of Slovenia?

When I asked Ms. Konečnik (personal communication, 7 May 2009) about what others could learn from the experiences of Slovenia she answered that keeping it very simple worked well for Slovenia. For example by using a slogan that is a logo at the same time. Also, to build a brand identity around a colour perspective (green) was very innovative.

According to Klančnik (personal communication, 26 May 2009), the bigger European countries, such as France, Spain and Italy have little to learn from Slovenia. Instead, Slovenia learned from them. However, “we can always exchange our experiences, because we believe our experiences are fair”

“We can teach a lot to countries in the ‘new’ Europe, certainly, the Czechs, the Slovaks and especially Bulgaria and Romania. We can teach them about our knowhow, about marketing, about branding, about branding of destinations, about challenges and so on and so on. Also because we kind of share a similar history” (Klančnik, personal communication, 26 May 2009).

“The countries that would most like to have this knowhow and need this knowhow and which we are open to help, assist and cooperate with are of course the countries of the Western Balkans, excluding Croatia, which is a wonderful case study. But yes, Bosnia, Montenegro, Serbia and Macedonia. They could learn a bloody hell lot from us” (Klančnik, personal communication, 26 May 2009).

5.2 Results and analysis on the brand equity

The questionnaire that was conducted among foreign tourists in Ljubljana, resulted in the following data. See the appendix for graphical representations of all these data. Through this research the brand equity (see section 3.7.2) of the ‘I feel Slovenia’ brand are measured.

5.2.1 Image of the location of Slovenia

64% of the respondents agrees or even strongly agrees with the statement ‘I think of Slovenia as an Alpine destination’. The image of Slovenia as a Balkan destination is very mixed: 35% (strongly) agrees with the picture of Slovenia as a Balkan destination, whereas 26% of respondents (strongly) disagree with this image. 31% is in between that and 8% does not know. There is no obvious image

of Slovenia as a Mediterranean destination, as almost half of the respondents neither agree nor disagree with the statement 'I think of Slovenia as a Mediterranean destination'.

As Slovenia wants to position itself as an Alpine and as a Mediterranean destination, the results are quite positive. However, the fact that 35% still thinks of Slovenia as a Balkan destination would in the ideal situation be a little lower, as Slovenia tries to prevent this association.

5.2.2 General images of Slovenia as a tourist destination

The image of Slovenia as a destination that has something specific to offer to every visitor is rather strong, with 53% of respondents agreeing to a certain extend and only 11% (strongly) disagreeing. Diversity in terms of geography is a little weaker, with 41% (strongly) agreeing to the statement 'I think of Slovenia as a geographically diverse destination' and 18% (strongly) disagreeing. The number of respondents that answered 'don't know' was relatively high with 26%. This could be because they did not understand what was meant with 'geographically diverse' or because they were only visiting Ljubljana and had no idea about the rest of the country.

Very positive is that 67% of respondents think of Slovenia as a safe destination and only 2% (strongly) disagrees. Slovenia scores also very high on authenticity, with 38% agreeing and 21% even strongly agreeing to the statement 'I think of Slovenia as an authentic destination'. Only 6% disagreed to a certain extend. Mass tourism is not associated with Slovenia, with 20% of respondents strongly disagreeing, 33% disagreeing and another 31% neither agreeing nor disagreeing to the statement 'I think of Slovenia as a destination for mass tourism'.

Again, these figures are rather positive. Authenticity and an image of niche (as opposed to mass) tourism are important values of the 'I feel Slovenia brand'. The image of Slovenia as a geographic diverse location, could be stronger, as Slovenia truly is quite diverse, especially for such a small country.

5.2.3 Image of different types of tourism in Slovenia

The statement 'I think of Slovenia as a destination for green tourism' was not very well defined as it allowed for different meanings, either as in eco or environmentally friendly destination, or as in nature tourism. Nevertheless, 64%

of the respondents (strongly) agree with this statement and only 8% (strongly) disagrees. The fact that 49% of respondents (agree or strongly agree) think of Slovenia as a destination for winter tourism is quite surprising, taking into account that the questionnaire was conducted in summer. Only 18% disagrees or strongly disagrees. Slovenia scores good as a destination for cultural tourism, with 49% of respondents agreeing or strongly agreeing with the statement 'I think of Slovenia as a destination for cultural tourism'. Only 15% (strongly) disagrees with this statement. Slovenia has a mixed image as a destination for adventurous tourism. 34% (strongly) agrees to the statement 'I think of Slovenia as a destination for adventurous tourism', but at the same time 18% neither agrees nor disagrees and 26% disagrees to a certain extent. The same counts for the image of Slovenia as destination for spa and beauty tourism, with 26% (strongly) agreeing, but also 31% (strongly) disagreeing and 28% in between those two. Where adventurous tourism and spa and beauty tourism proved to have a mixed image, Slovenia is clearly not associated with a beach tourism destination. 21% strongly disagrees, 28% disagrees and 28% neither agrees nor disagrees with the statement 'I think of Slovenia as a destination for beach tourism'.

As the results above show, winter tourism and cultural tourism seem to have quite strong images among the respondents. The niche markets of adventurous tourism and spa and beauty tourism are not very well associated with Slovenia yet among the respondents. As these are niche markets, that are only relevant for specific target groups, this should not come as a surprise.

5.2.4 Celebrity and conversational value of the destination of Slovenia

The respondents answered very divergent on the statement 'visiting Slovenia makes me a trend setter'. 18% strongly disagreed, 18% disagreed, 23% agreed nor disagreed, 10% agreed, 13% strongly agreed and 18% answered 'don't know'. The similar but slightly more explicit phrased statement 'visiting Slovenia gives me a certain status among friends', was strongly disagreed with by 15% of the respondents, 21% disagreed and 38% agreed nor disagreed. Only 13% agreed to a certain extent. However, 36% agrees and 33% even strongly agrees with the statement 'a visit to Slovenia gives me something to talk about with my friends'.

To 18% of the respondents Slovenia as a destination is a brand, whereas to 44% Slovenia as a destination is not a brand.

We can conclude that Slovenia certainly has conversational value, but that it has not reached the level of a celebrity destination (yet). Status and brand value are not concepts in which most people think of the destination of Slovenia. It would be interesting to see if the respondents think of any destination in these terms.

5.2.5 Actual experience and recomendability of the destination of Slovenia

The actual experience of visitors to Slovenia is for 64% above expectations: 23% strongly agrees and 41% agrees with the statement 'my image of Slovenia as a tourism destination has positively changed since I came here'. Only 8% (strongly) disagrees. This results in the fact that 79% of the respondents would recommend friends to visit Slovenia too. However, 67% thinks that most of their friends do not know Slovenia as a tourism destination. Only 13% believes the contrary.

As the figures show, a visit to Slovenia is in most cases above expectations and even such that 4 out of 5 visitors would recommend friends to visit Slovenia too. These are very positive scores that should give plenty of room for worth of mouth communication. However, the great majority of respondents believe that their friends do not recognise Slovenia as a tourism destination, let alone consider a visit.

5.2.6 Brand logo of 'I feel Slovenia'

After showing the respondents the 'I feel Slovenia' logo, 41% strongly disagreed and 31% disagreed (72% in total) with the statement 'I have seen this symbol before I came to Slovenia'. Only 13% had seen the symbol before arriving in Slovenia. This score is slightly better for the statement 'I have seen this symbol (I feel Slovenia logo) in Slovenia', but still only 18% (strongly) agrees and the great majority (67%) claims not to have seen the logo in Slovenia. It is then surprising to see that 43% claims to know what the symbol stands for and means (agree and strongly agree).

The 'I feel Slovenia' brand receives very little recognition among the respondents, both outside and within Slovenia. To a limited extend, it can be concluded that this limits the influence of the 'I feel Slovenia' brand on foreign visitors' image of Slovenia as tourism destination. On the other hand is the logo not visible in all

communications about the brand, which could explain why people would know the brand values without recognising the logo. These could be PR utterances, word of mouth communications, but also from political messages.

5.3 Conclusion to the definition of problem

In section 5.3.1 the definition of problem is answered. Section 5.3.2 answers the sub questions of the definition of problem.

5.3.1 The role of branding

The definition of problem of the dissertation is: 'What can be the role of branding in attracting inward tourism to a destination?'

There are two basic roles that destination branding can have. Firstly, a destination brand can have the role of a set of communication guidelines that are based on a strong brand identity, which is agreed upon and approved by the key stakeholders. In this sense, the destination brand is mostly an internal tool, that helps the destination to align its communication messages around one central theme or a set of values, which is the brand identity. The brand is in this case a set of communication rules, that consists of procedures about the type, the content and the style of communication messages. If these communication guidelines are used consistently over a long period of time, they will certainly have an effect and the brand will prove its value.

Secondly, a more comprehensive role of the destination brand can be the one that classical consumer brands have: to differentiate from competitors, to help the consumer in making choices and to add value to a product or service. This goes a step further than the just discussed 'brand as a communication guideline' variant. This is a possibility for destination brands too, but there are huge challenges to overcome before they can reach this level. Especially limited budgets, a lack of a long term strategic approach, poor visibility of the brand and the fact that target groups only think of destinations as brands to a limited extent, make that this status for destination brands is hard to reach. Nevertheless, there is no reason why these challenges could not be overcome and why destination brands could not reach the same level as well-known consumer brands. However, for most destinations, including Slovenia, this is something for the future and should only be strived for if all the mentioned challenges are overcome.

5.3.2 Successfulness of 'I feel Slovenia'

The sub question that is answered here is: How well was the process of developing the 'I feel Slovenia' brand done and how successful is the 'I feel Slovenia' brand in the field of tourism? What can other destinations learn from the experiences of Slovenia?

The process of creating the 'I feel Slovenia' brand was rather well done. Most aspects that are named as important success factors in the existing theory on destination branding were taken care of. The brand is build around a well researched and well developed brand identity that has the approval of key stakeholders, including the Slovenian public. Furthermore, the reasons for engaging in branding were valid and the foundations on which the brand was build were strong. These foundations are a professional tourism board that is stably funded, strong connections between key stakeholders in the tourism industry, experience in promoting tourism and knowledge of marketing and branding.

However, the development of the brand after its creation and introduction did not receive the attention and recourses it deserved and needed. The further development of the brand has slowed down and is in risk of coming to a complete standstill if no funding, political support, a long term strategic approach, evaluation criteria and partnerships with private parties are taken care of.

The 'I feel Slovenia' brand itself, as measured in terms of brand equity, is on its way, but will if the current strategy is continued, probably not reach the status of a brand in the classical sense, that adds great value to products or services. For that, the brand lacks far too much visibility and support from stakeholders. Positive is that the brand associations the target group has with the brand correspond quite well to the brand identity, which shows the potential of the brand.

There is certainly something that other destinations can learn from the experiences of Slovenia. Slovenia used all its experience in tourism promotion to establish not just a destination brand but even attempted to create a country brand, with all the challenges it brings. This a difficult process and requires a lot of courage and perseverance. Especially the way in which the branding process

was undertaken can act as a great example for other destinations. Probably the most important conclusion is that even with a small budget (€200.000 in the case of 'I feel Slovenia') a brand can be created. If there is the willingness of key stakeholders to cooperate and the fundamentals on which the brand is build are solid, there is no reason why the brand could not become a success. See section 6.2 for specific recommendations to destinations about destination branding.

For an answer to the second sub question of the definition of problem, 'How can Europe Destination Marketing apply destination branding to the situation of its clients?', see the recommendations to EDM in section 6.3.

6 RECOMMENDATIONS

6.1 Recommendations to the STB and the GCO

- In order to develop a brand that is not only a destination brand but a true country brand, more financial and human resources should be given to the brand management, so that the GCO can actively approach potential partners and create more vibe around the brand. This would help the GCO to regain the leadership in the development of the brand, which will also clarify the current unclear and undesired situation around the brand management function, between the GCO and the STB. If no additional financial and human resources can be allocated for the brand management, it should be considered to give this function to the STB and to continue with 'I feel Slovenia' as a destination brand. If the brand is well developed as a destination brand without changing the brand values, it could always be extended later to become a country brand again.
- Further research into specific target groups of the brand should be done, which should result in clear profiles of these target groups. This is common practice for consumer brands, so the advice is to take a successful consumer brand target group profile as an example. This will help to design very specific advertising and PR messages for these target groups, that satisfy both rational and emotional needs.
- The image of Slovenia as a tourism destination and of the 'I feel Slovenia' brand should be constantly evaluated. Segmented target groups should be distinguished for this, which will also help to create the target group profiles that were discussed in the previous point.

- As most visitors to Slovenia would recommend a visit to Slovenia, but at the same time state that most of their friends do not know Slovenia as a tourism destination, there are great opportunities to turn these tourists into brand ambassadors. More research should be done on how the STB can support these tourists in promoting Slovenia as a tourism destination through word of mouth (WoM) communication.
- The visibility of the 'I feel Slovenia' brand on popular tourism places in Slovenia should be increased dramatically. An inspirational example of this is the huge 'I Amsterdam' logo on the Museum Square in Amsterdam. This has become a popular place for tourists to take their group pictures. These pictures travel the world and are shown to friends at home, which is a great example of WoM communication.
- However, before the visibility of the logo is increased, consensus should be reached on the design of the logo. If the logo has to be changed, it is best to do it as soon as possible. Also, it should be considered how the logo can be adjusted for very specific target markets. An inspirational example of this is given by the famous Absolut Vodka campaign. For every target group or occasion the visual (a vodka bottle) can be changed, without changing the values of the brand. The 'I feel Slovenia' brand too, might be able to better serve niche markets if the visual of the brand can be adjusted for niche target markets.

6.2 Recommendations to other destinations

It cannot be stressed enough how important it is for a destination to create a solid base before engaging in destination branding. This solid base means that the destination has a well established tourism board, connections and partnerships with key stakeholders and that skills and knowledge of marketing and branding are present. Before these are in existence, a destination should not engage in branding. The project would be doomed to fail, either before the brand has seen the light or shortly after that. The most important recommendation to these destinations is to learn from the experiences of others and not to reinvent the wheel themselves. Both the theoretical framework and the evaluation of the 'I feel Slovenia' brand are full of these experiences. Especially the challenges and success factor sections are worth a second look for destinations that want to

learn more about branding. It would be impossible to list all these challenges and success factors on their importance, as they will be different for each destination.

6.3 Recommendations to EDM

In this section of the report, the second sub question of the definition of problem is answered: How can Europe Destination Marketing apply destination branding to the situation of its clients? As destination branding, provided that it is build on a solid basis and on the condition that it is well executed, can bring great advantages to destinations, this is also truth for the client destinations of Europe Destination Marketing. However, as was evident from personal communication with Van der Avoort (18 May 2009), the director of EDM, the client destinations of EDM currently do not have this stable fundament yet that is needed for successful branding. Therefore, these destinations probably will not (and certainly should not) engage in destination branding before this solid fundament is build, which will probably take a few years.

For Europe Destination Marketing, this has the following consequences:

- Until the client destinations have created solid fundamentals, there is little role for EDM in helping the destinations with branding. However, in the meantime EDM should not lose track of the developments in this field, as it will be a great competitive advantage to have knowledge of branding by the time the clients of EDM are ready to engage in branding.
- By the time the current clients, or new clients, have build these fundamentals, there could be an important role for EDM as an external advisor to these countries, as the view of external (foreign) experts if of great importance to destinations, especially in creating the brand identity.
- Another role for EDM, related to creating a brand identity, is that they could do research for these destinations about their current image among target groups, for example on the Benelux market.
- Although EDM is focussed on destinations in South-Eastern Europe, there might be plenty of opportunity to help other destinations, including cities and other geographical entities, with their branding. Taking the limited capacity of EDM into account, this might prove easier to achieve on the short term.

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8 APPENDICES

8.1 General information about Slovenia and the Slovenian tourism industry

Table 8.1 Quick facts about Slovenia

Official name	Republic of Slovenia
Capital	Ljubljana
Area	20,273 sq km
Population (July 2009 est.)	2,005,692
Urban population (2008)	48% of total population
Ethnic groups (2002 census)	Slovene 83.1% Serb 2% Croat 1.8% Bosniak 1.1% Other or unspecified 12%
Religions (2002 census)	Catholic 57.8% Muslim 2.4% Orthodox 2.3% Other Christian 0.9% Unaffiliated 3.5% Other or unspecified 23% None 10.1%
Independence from Yugoslavia	25 June 1991
Year of EU entry	2004
Year of Euro introduction	2007
GDP (2008 est.)	\$59.14 billion
GDP per capita (2008 est.)	\$29,500

Source: CIA World fact book (2009)

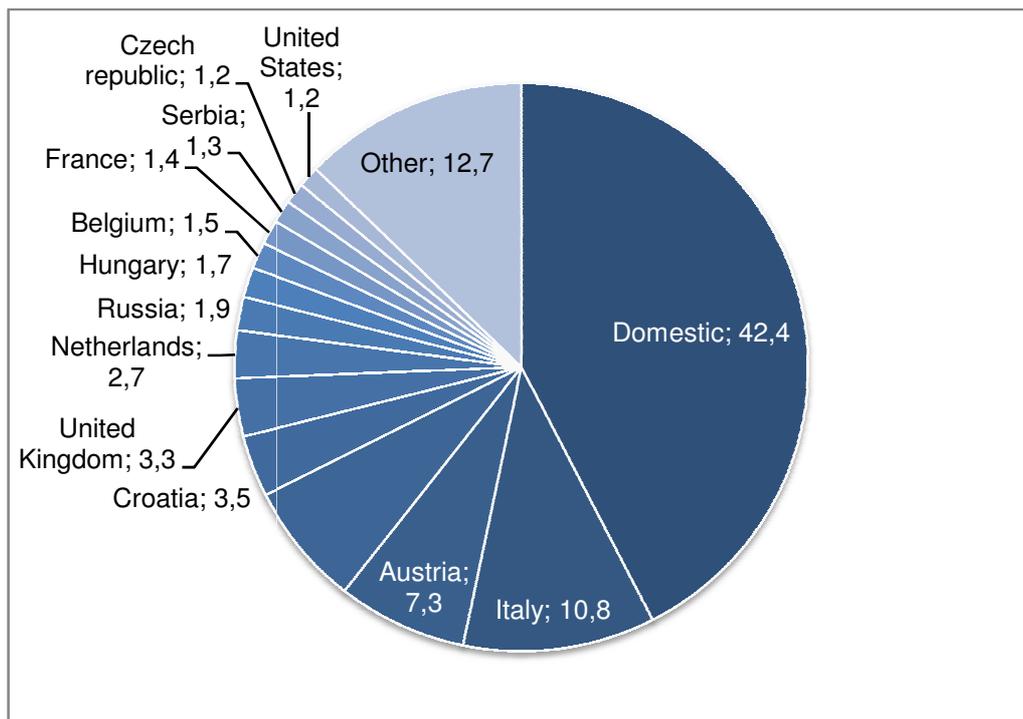


Figure 8.2 Share of overnight stays in tourists in Slovenia in 2008 by country

Source: Slovenian Tourist Board (2008)

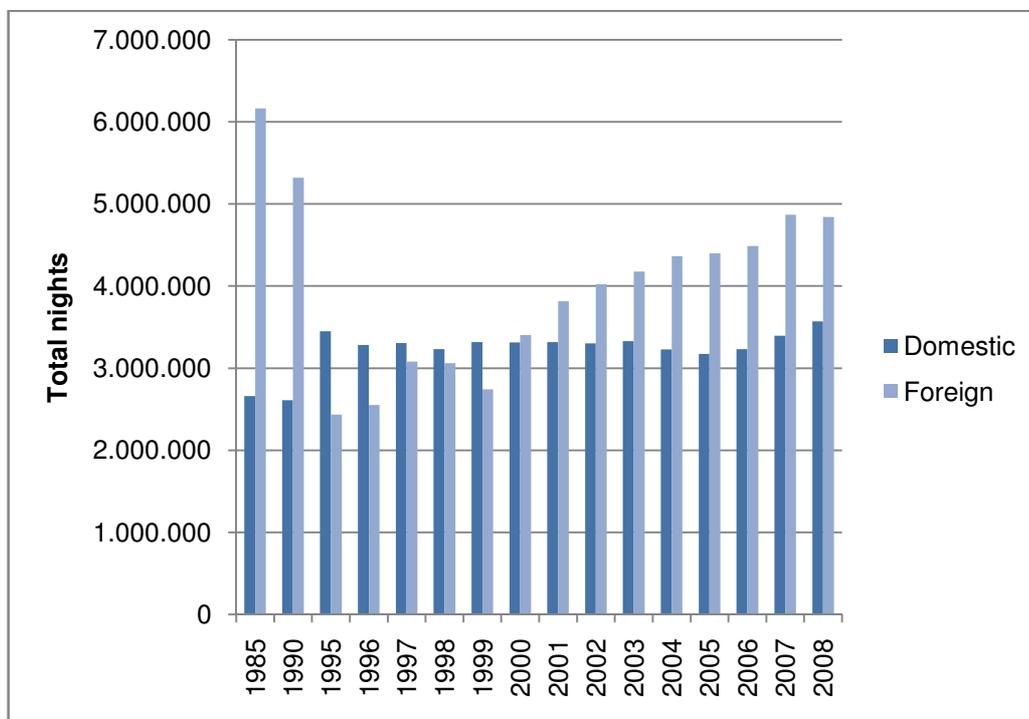


Figure 8.3 Number of domestic and foreign overnight stays in Slovenia

Source: Slovenian Tourist Board (2008)

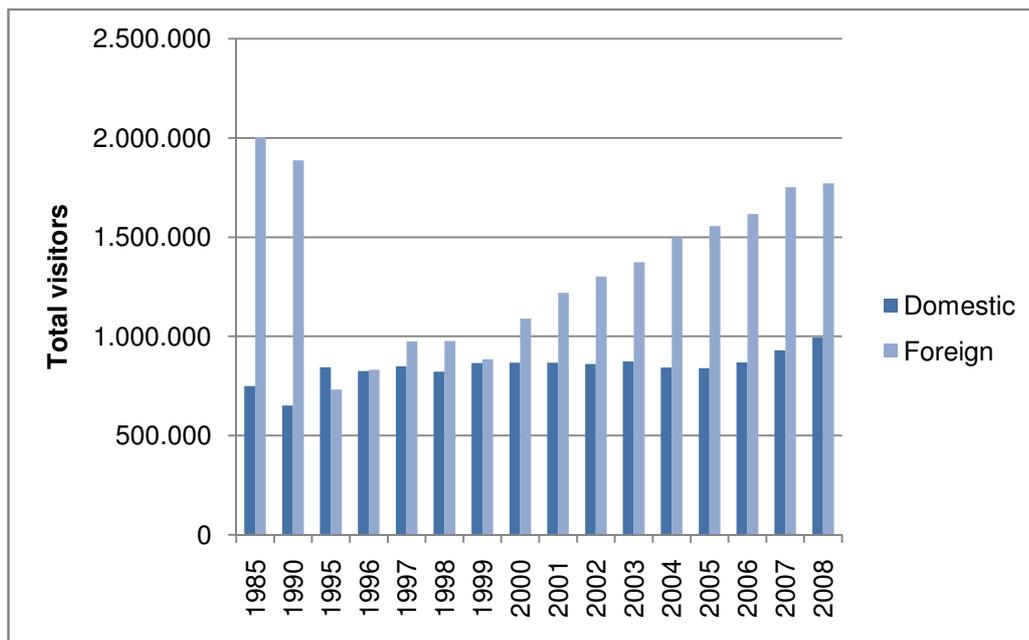


Figure 8.4 Number of domestic and foreign arrivals in Slovenia
 Source: Slovenian Tourist Board (2008)

8.2 The 'I feel Slovenia' brand

Below are three quotes that describe the 'I feel Slovenia' brand in the area of tourism, coming from *the Brand of Slovenia* (Slovenian Ministry of the Economy, 2007)

“Slovenian green is an experience of Slovenia that that one remembers the longest. It relaxes since it represents the balance of an individual as well as the society and its development. However, contagious energy emerges from the constant pursuit of desires. Slovenia encourages you to finally take on something you have always wanted but... You feel pleasant excitement. You will do something for yourself. The harmony of senses, with which you have experienced Slovenian green, will provide you with élan as well as calm you down even after your vacation. Vacation in Slovenia restores your balance, because in Slovenia you are always in touch with something elemental, be it water, the smell of a forest or the original flavour of a dish.”

“A diverse Slovenia, according to my desires

Slovenia encourages the pursuit of personal desires. A common feature of the Slovenian tourist product is a vacation intended to pamper all senses in the manner the guest chooses. A vacation in Slovenia is characterized by an exquisite selection tailored to each guest. Slovenia allows, supports, advocates selfness – doing and pampering ourselves with things we enjoy. In Slovenia you feel yourself again.”

“Green around me, green in me

Diverse Slovenian tourist services are connected by a green, preserved natural environment that joins our cultural and natural heritage in a balanced whole. In Slovenia you feel safe. Genuine contact with nature and oneself results in a regained balance. The memory of Slovenian green gives you élan and simultaneously relaxes you. You feel Slovenia. You will return for Slovenian green.”

8.3 Interviews

8.3.1 Interview with Matjaž Kek

Interviewee:	Matjaž Kek
Organisation:	Government Communication Office
Function:	Secretary and brand manager of the 'I Feel Slovenia' brand
Place of the interview:	Ljubljana, Slovenia
Date and time:	7 May 2009, 11:00 AM
Duration:	90 minutes

The following topics were discussed during the interview:

- The road to and the establishment of the 'I feel Slovenia' brand
- The role of Mr. Kek and of the Government Communication Office
- The introduction phase of the brand
- Challenges in managing the brand
- Promotional usage of the brand, full branding and co-branding
- Successfulness of the brand

A digital recording of the interview is available upon request.

8.3.2 Interview with Maja Konečnik

Interviewee:	doc. dr. Maja Konečnik
Organisation:	University of Ljubljana
Function:	Assistant professor in the Marketing Department of the Faculty of Economics
Place of the interview:	Ljubljana, Slovenia
Date and time:	7 May 2009, 14:30 PM
Duration:	45 minutes

The following topics were discussed during the interview:

- Research that Ms. Konečnik has done about this topic
- Previous marketing campaigns that were held to promote Slovenia and/or the Slovenian tourism industry

- The background of the 'I feel Slovenia' brand and the reasons for establishing it
- The process of establishing the brand identity
- The brand management function for the 'I feel Slovenia' brand
- Perception of the 'I feel Slovenia' brand among domestic and foreign publics
- Challenges in establishing the brand
- The use of destination branding as compared to other forms of promotion and marketing
- The successfulness of the brand so far and the future of the brand

A digital recording of the interview is available upon request.

8.3.3 Interview with Dennis van der Avoort

Interviewee	Dennis van der Avoort
Organisation	Europe Destination Marketing
Function	Founder and director
Place of the interview	Delft, the Netherlands
Date and time:	18 May 2009, 11:00 AM
Duration:	60 minutes

The following topics were discussed during the interview:

- The state of tourism and destination branding in countries in the Balkan
- The working methods of EDM
- Challenges EDM faces in promoting destinations

8.3.4 Interview with Rok Klančnik

Interviewee	Rok Klančnik
Organisation	Slovenian Tourism Office Benelux
Function	Director
Place of the interview	Brussels, Belgium
Date and time:	26 May 2009, 14:00 PM
Duration:	45 minutes

The following topics were discussed during the interview:

- The creation of the 'I feel Slovenia' brand, Mr. Klančnik's own role and previous campaigns for tourism in Slovenia
- Translation of the brand into advertising and PR messages
- Funding of the STB and the STO Benelux
- Consistency in the use of the brand
- Limitations to the possibilities the brand offers
- Successfulness of the brand

A digital recording of the interview is available upon request.

8.4 Questionnaire

Below is the questionnaire that was used in the research. It is slightly edited to fit the paper.

1	What is the main purpose of your visit to Slovenia? <i>(Please place an X behind the answer of your choice, only one answer possible)</i>	
	Holiday	→ Please answer all questions
	Visiting family or friends	→ Please answer all questions, except question 5
	Business	→ Please answer all questions, except question 5
2	Where do you live? <i>(please fill in the name of your country of residence)</i>	
3	How many times have you visited Slovenia before? <i>(place an X behind the answer of your choice, only one answer possible)</i>	
	This is the first time	
	This is the second time	
	This is the third time or more	
4	Will you visit other countries during this trip as well? <i>(place an X behind the answer of your choice)</i>	
	No, I will only visit Slovenia	
	Yes, I will visit the following countries: <i>(please specify which countries)</i>	
5	Why did you first consider to go to Slovenia on holiday? <i>(place an X before your answer(s) of choice, more answers possible)</i>	
	Recommended by family or friends	
	Recommended by travel agent	
	Recommended in the media (television, travel magazine, etc.)	
	Advertisement for visiting Slovenia	
	Other reason: <i>(please specify)</i>	
6	What information sources about Slovenia did you consult before your visit? <i>(place an X before your answer(s) of choice, more answers possible)</i>	
	Slovenian Tourism Board	
	Travel agent	
	Family or friends	
	Travel guide (e.g. Lonely planet, Rough guide)	
	Travel website	

Other: <i>(please specify)</i>	
--------------------------------	--

	Please indicate to what extent you agree with the following statements (Place an X in the appropriate box, only one answer possible)	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
7	I think of Slovenia as an Alpine destination						
8	I think of Slovenia as a Balkan destination						
9	I think of Slovenia as a Mediterranean destination						
10	I think of Slovenia as a destination for adventurous tourism						
11	I think of Slovenia as a destination for spa/ beauty tourism						
12	I think of Slovenia as a destination for cultural tourism						
13	I think of Slovenia as a destination for beach tourism						
14	I think of Slovenia as a destination for winter tourism						
15	I think of Slovenia as a destination for mass tourism						
16	I think of Slovenia as a destination for green tourism						
17	I think of Slovenia as an authentic destination						
18	I think of Slovenia as a geographically diverse destination						
19	I think Slovenia has something specific to offer for every visitor						
20	I think of Slovenia as a safe destination						
21	Visiting Slovenia makes me a trend setter						
22	I think most of my friends know Slovenia as a tourism destination						
23	A visit to Slovenia gives me something to talk about with my friends						
24	Visiting Slovenia gives me a certain status among friends						
25	I would recommend my friends to visit Slovenia						
26	Slovenia as a tourism destination is a brand to me						
27	Before I came here, I received contradicting images of Slovenia as a tourism destination						
28	My image of Slovenia as a tourism destination has positively changed since I came here						
	See this figure before answering the following questions						

	I FEEL SLOVENIA							
29	I have seen this symbol before I came to Slovenia							
30	I have seen this symbol in Slovenia							
31	I know what this symbol stands for and means							

8.5 Data from questionnaires

Below are the results of all the 31 questions that were used in the questionnaire. Not all these results were used in the dissertation.

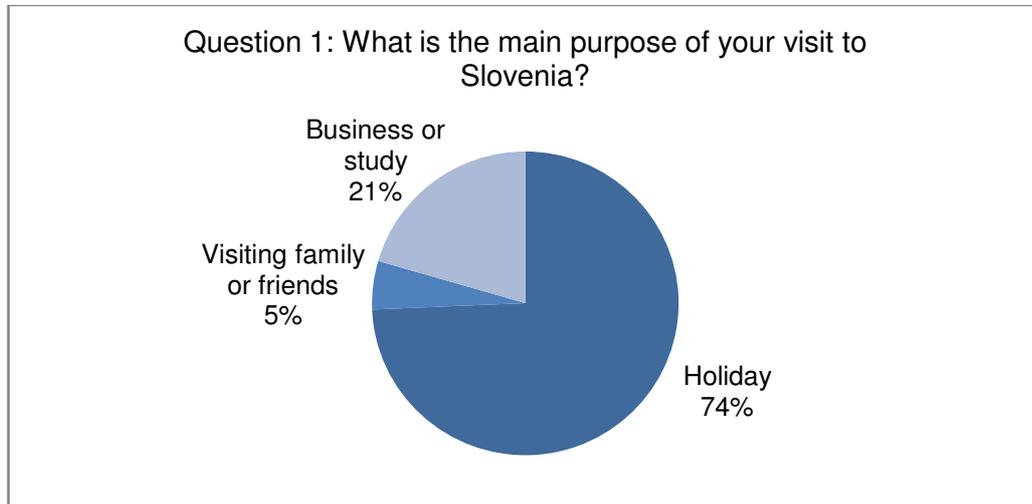


Figure 8.5 Main purpose of visit to Slovenia

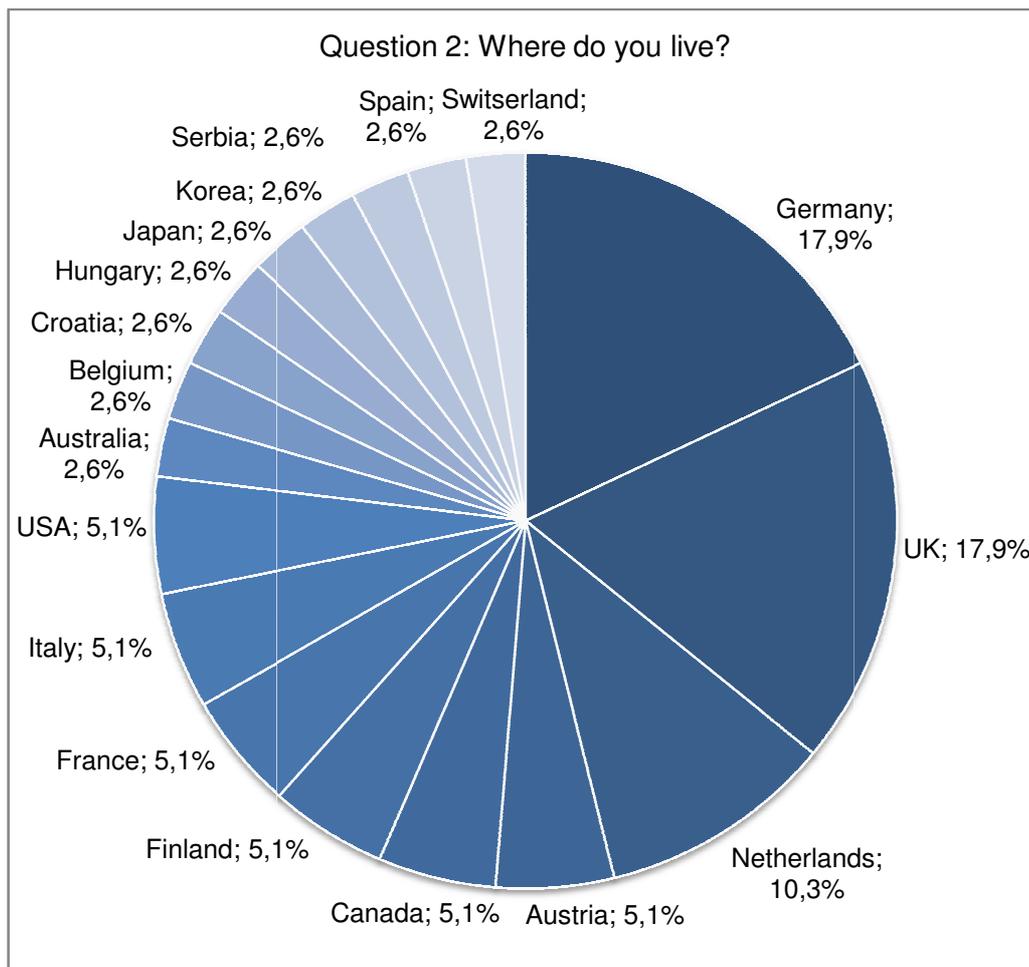


Figure 8.6 Respondents by country of residence

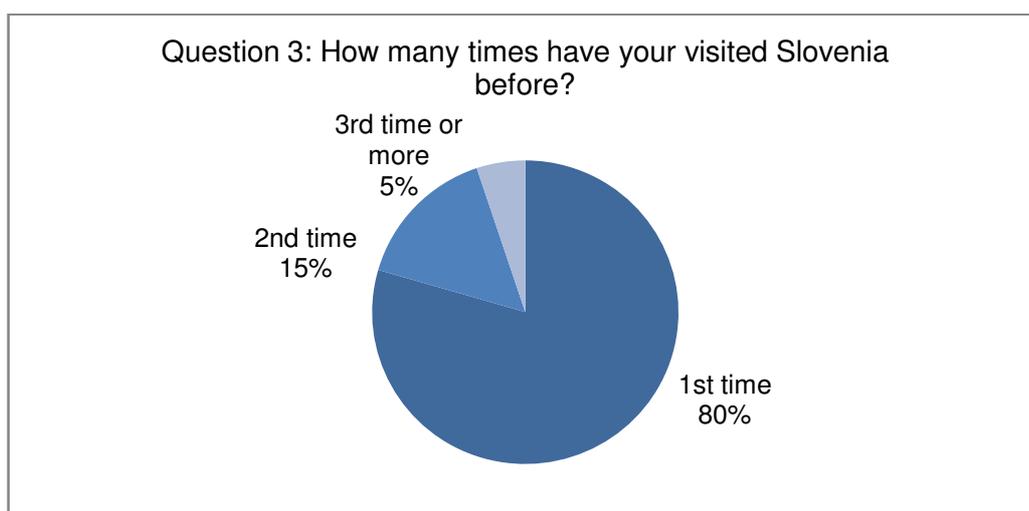


Figure 8.7 Previous visits to Slovenia

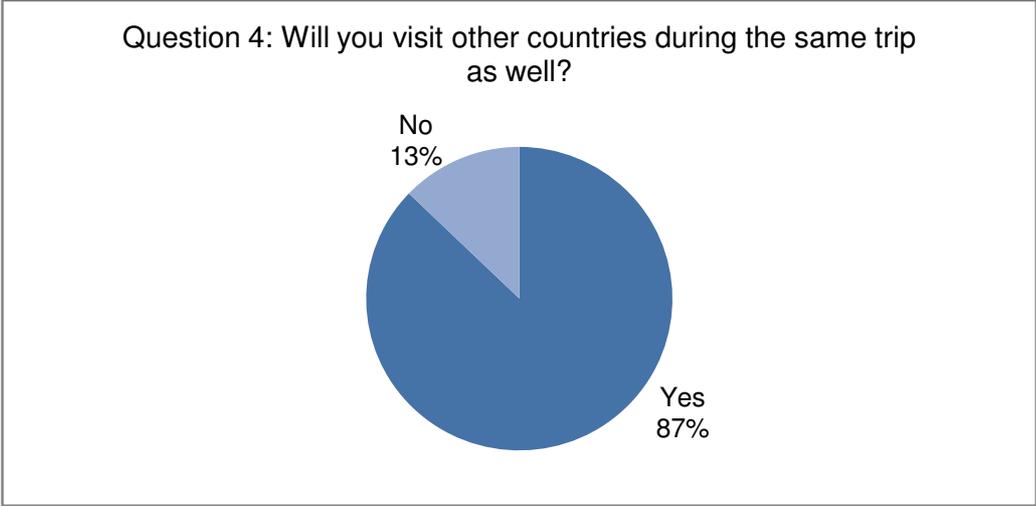


Figure 8.8 Slovenia as part of visits to other countries

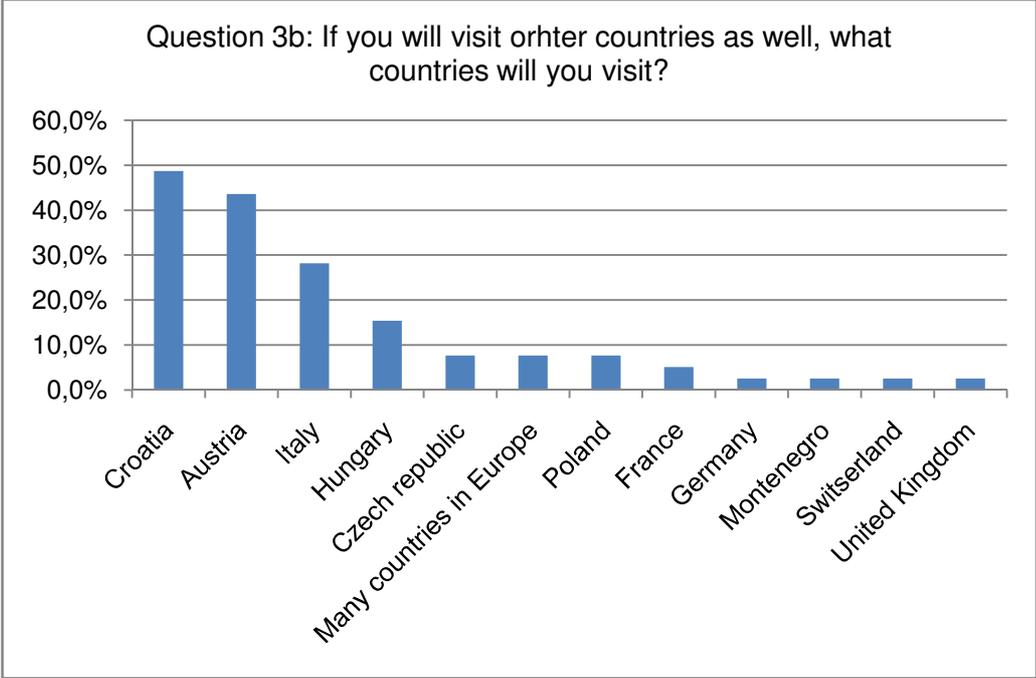


Figure 8.9 Other countries visited by visitors to Slovenia

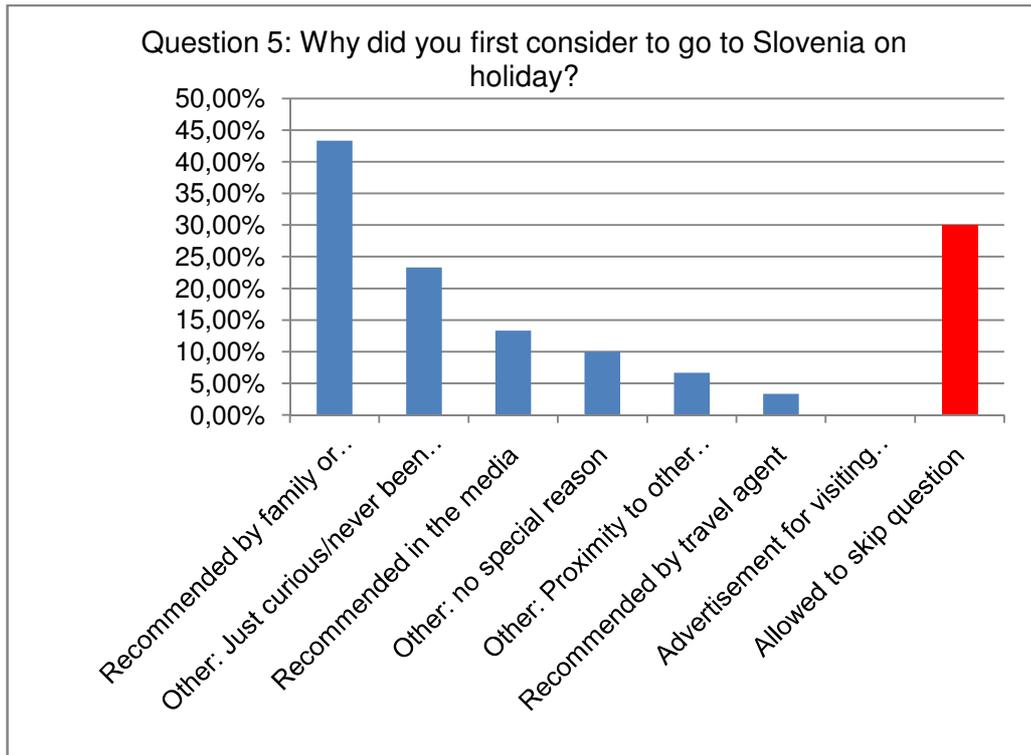


Figure 8.10 Stimuli for considering to visit Slovenia for holiday

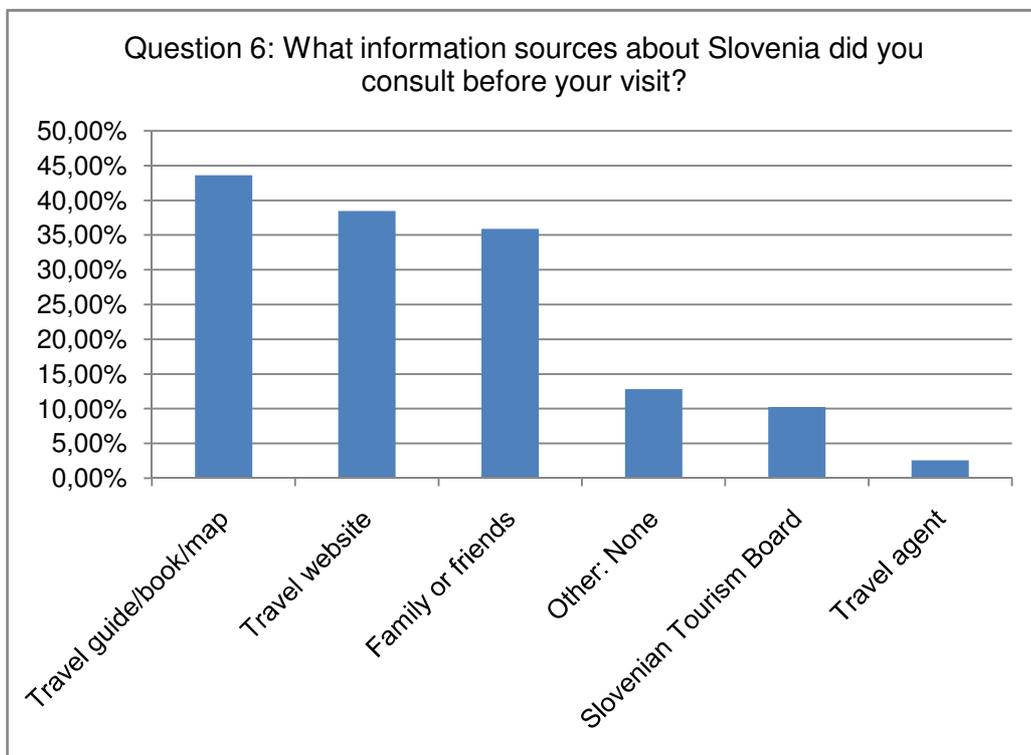


Figure 8.11 Consulted information sources before coming to Slovenia

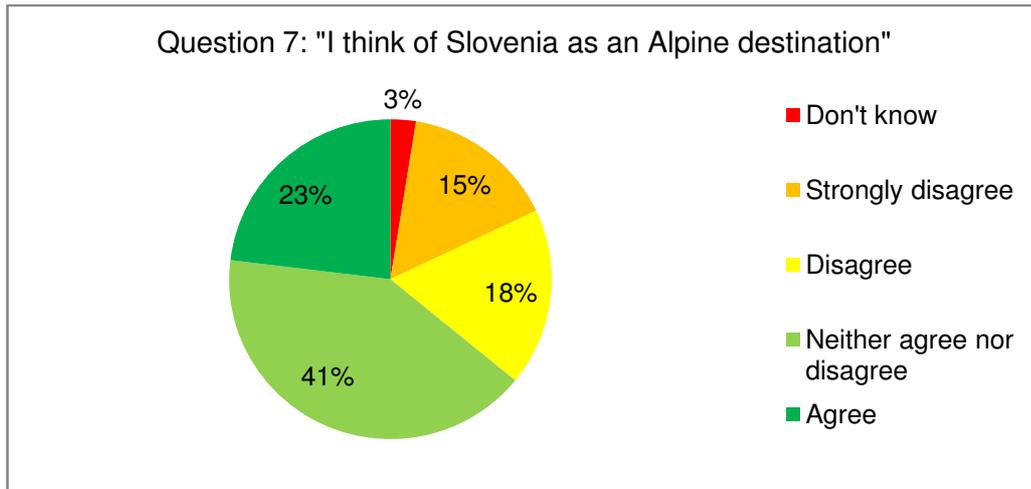


Figure 8.12 Slovenia as an Alpine destination

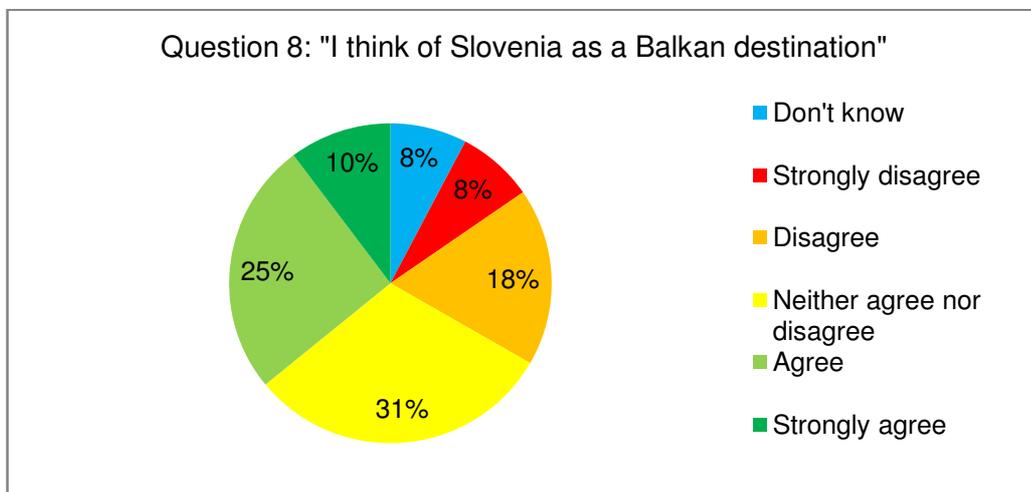


Figure 8.13 Slovenia as a Balkan destination

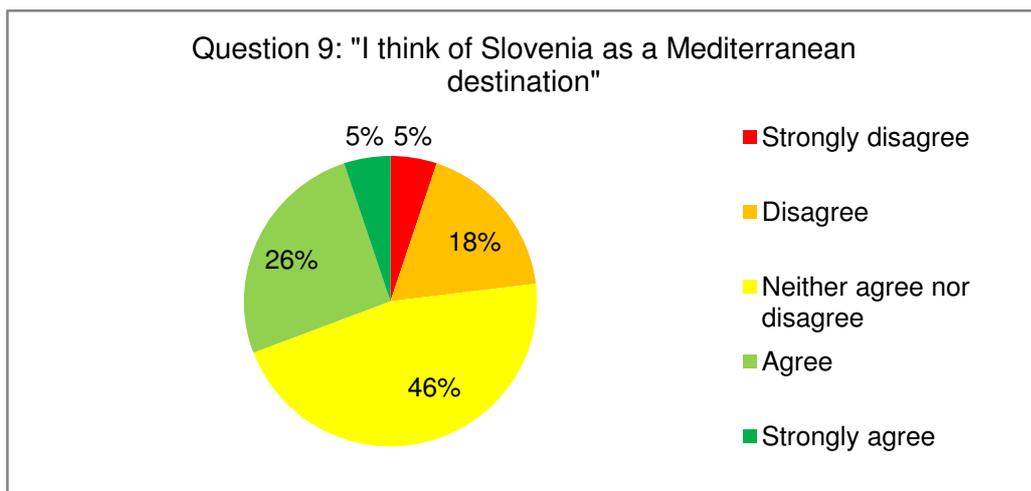


Figure 8.14 Slovenia as a Mediterranean destination

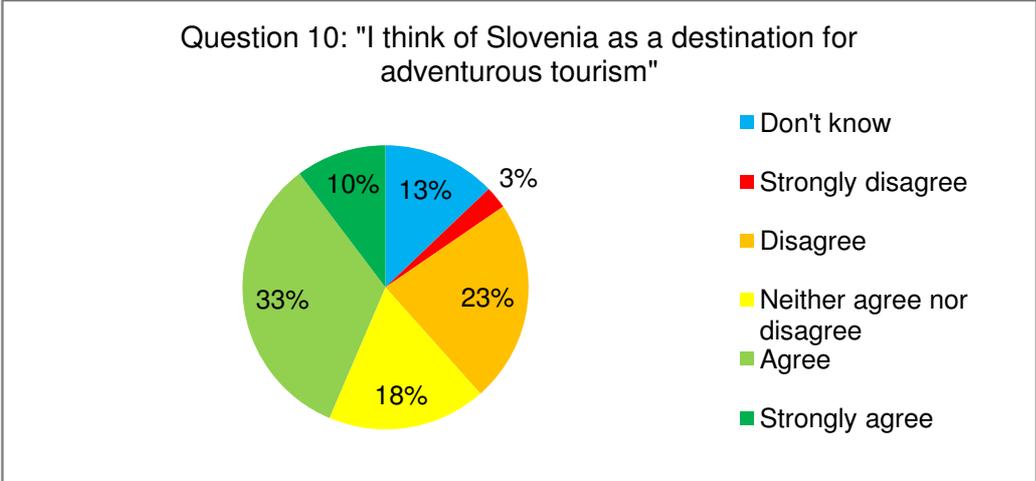


Figure 8.15 Slovenia as a destination for adventurous tourism

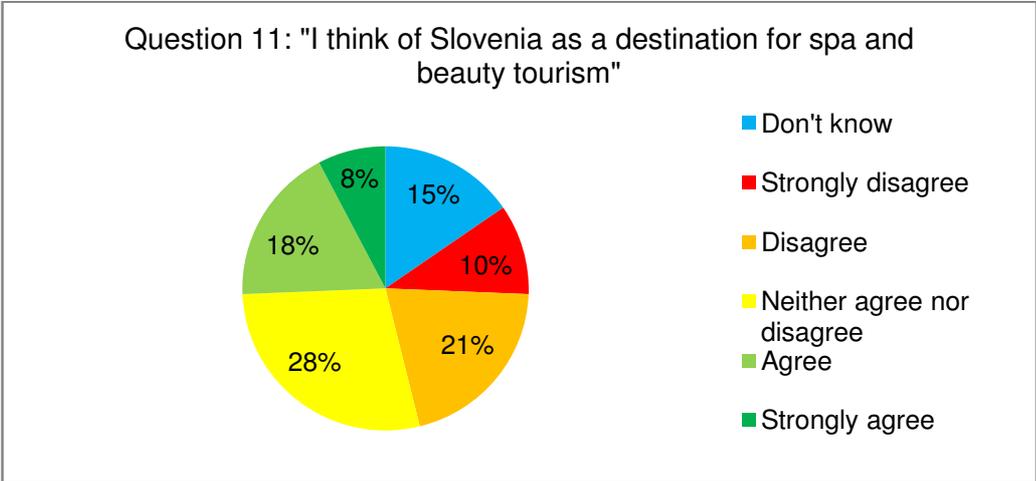


Figure 8.16 Slovenia a destination for spa and beauty tourism

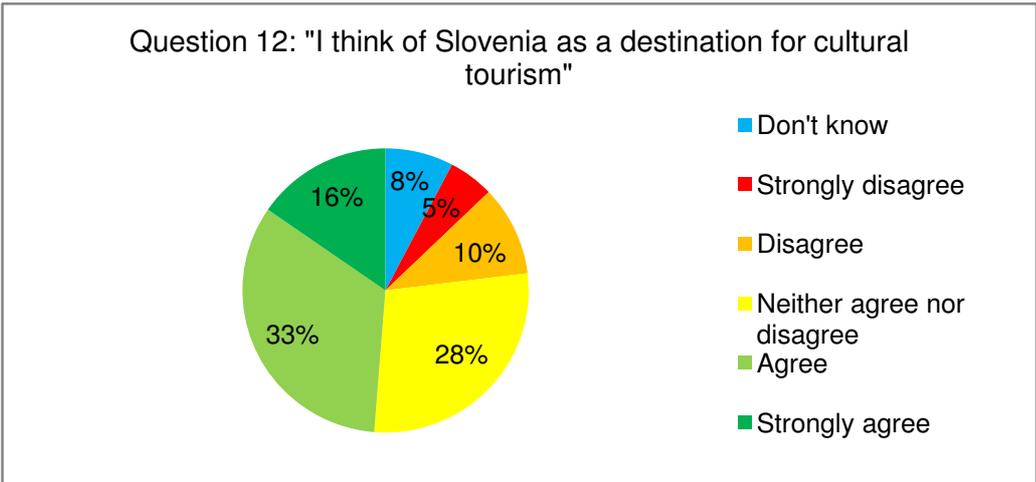


Figure 8.17 Slovenia as a destination for cultural tourism

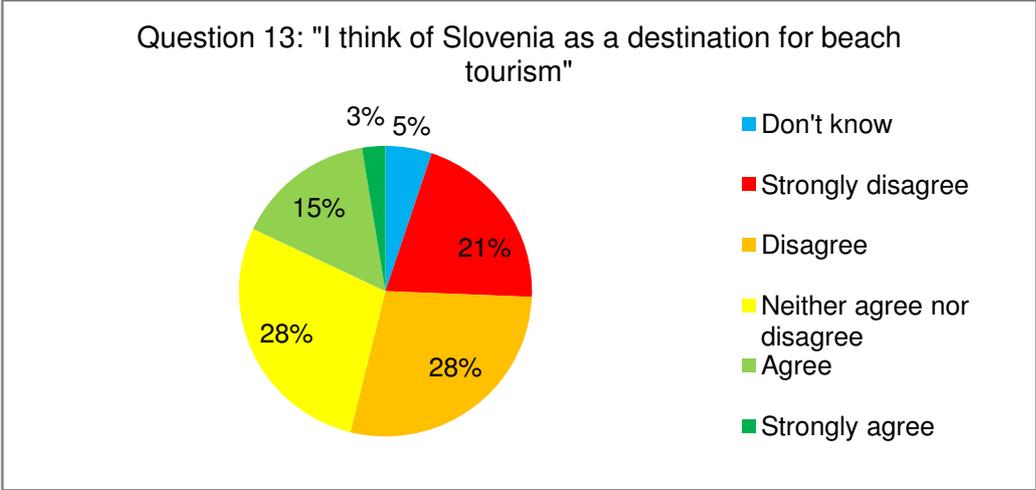


Figure 8.19 Slovenia as a destination for beach tourism

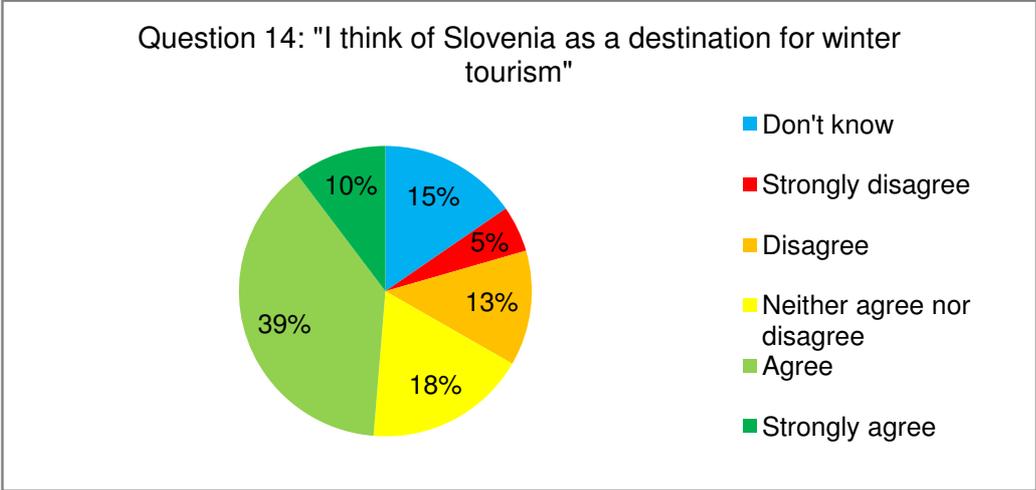


Figure 8.20 Slovenia as a destination for winter tourism

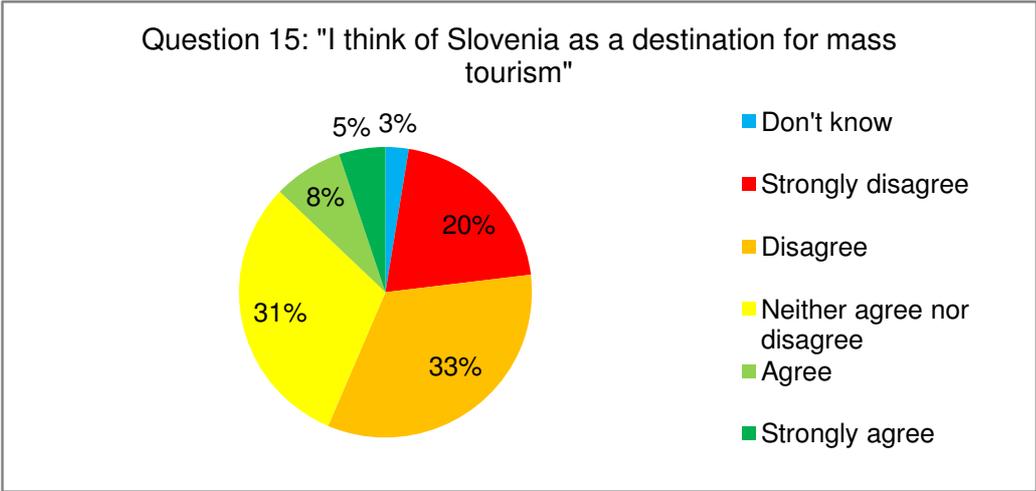


Figure 8.21 Slovenia as a destination for mass tourism

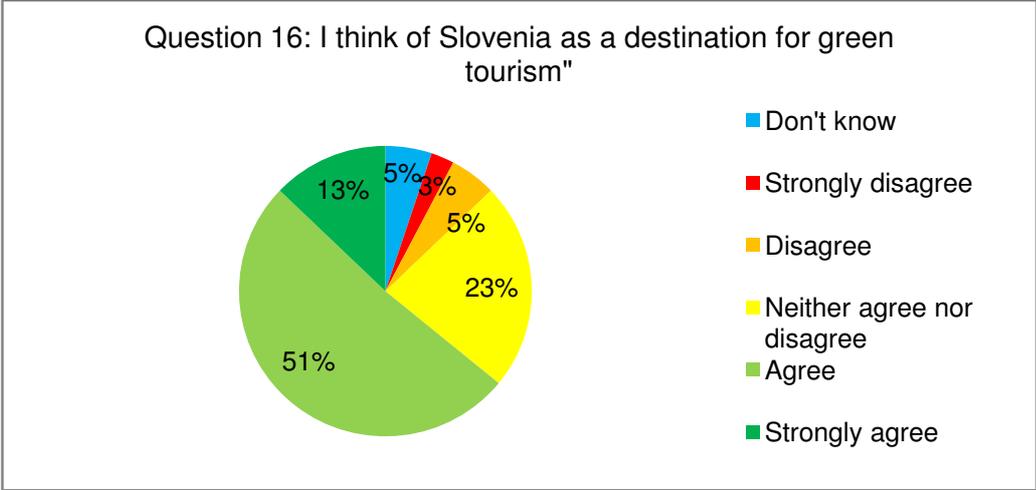


Figure 8.22 Slovenia as a destination for green tourism

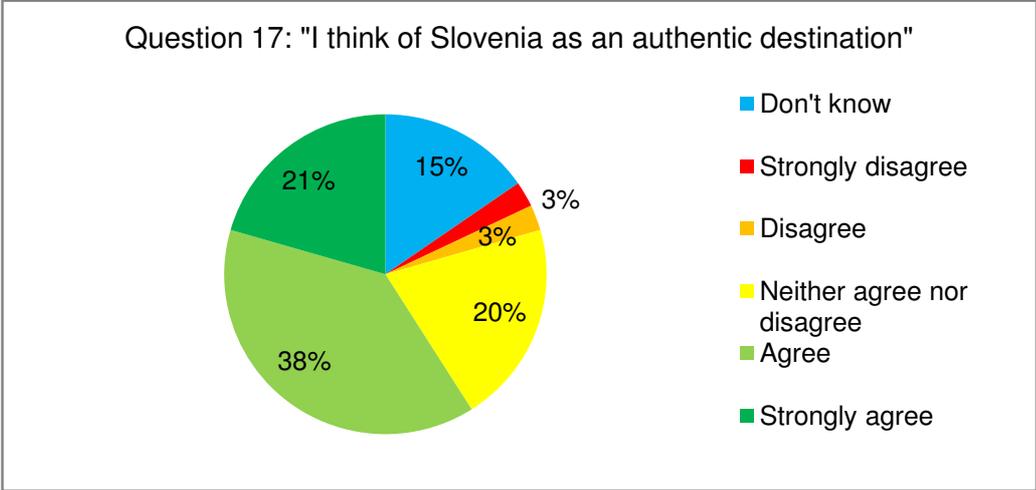


Figure 8.23 Slovenia as an authentic destination

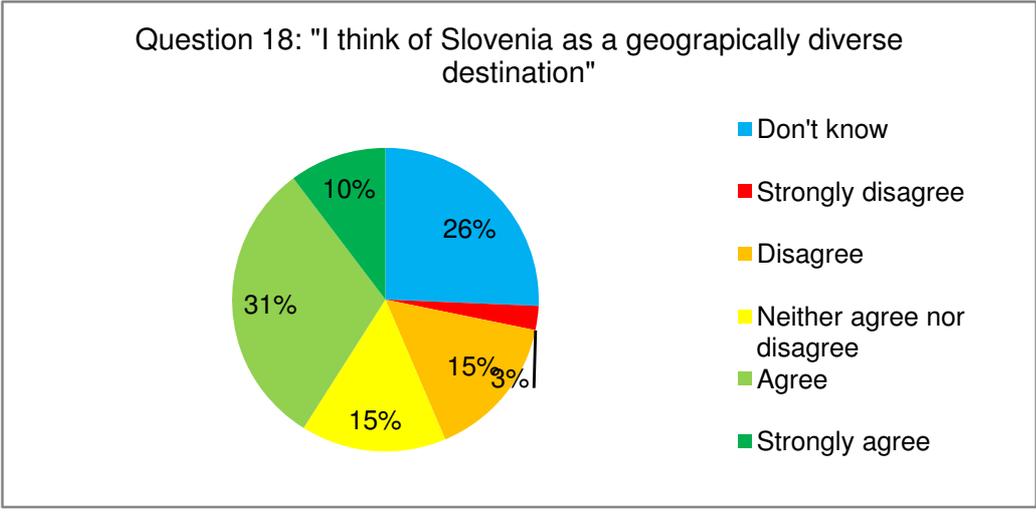


Figure 8.24 Slovenia as a geographically diverse destination

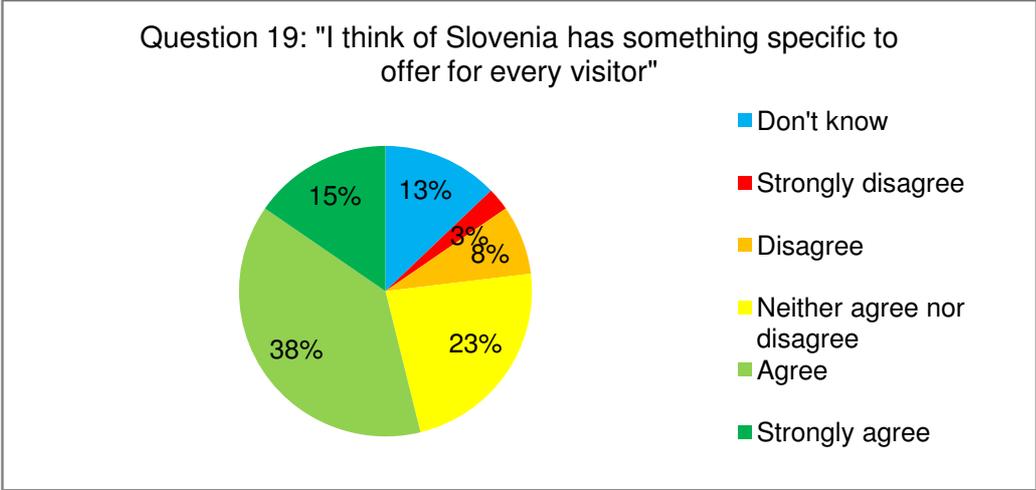


Figure 8.25 Slovenia as a destination with a varied offer for visitors

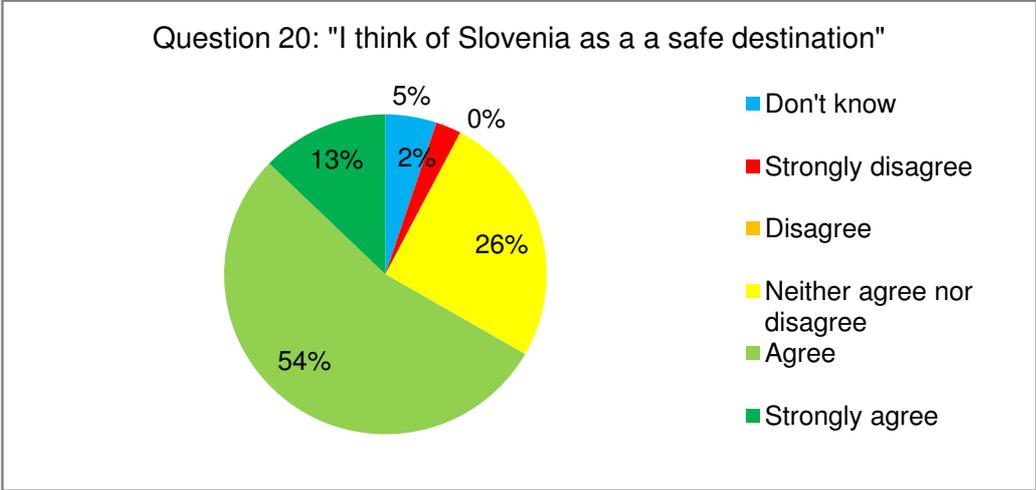


Figure 8.26 Slovenia as a safe destination

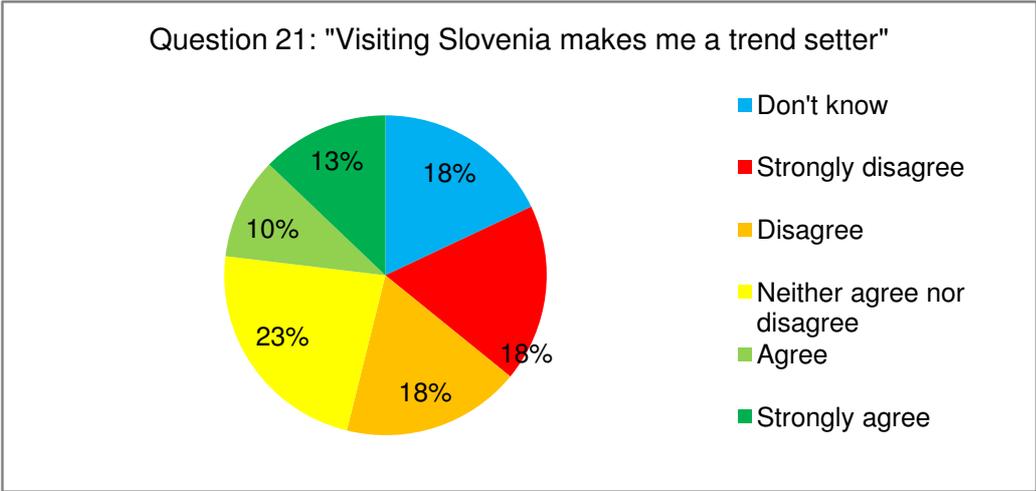


Figure 8.27 Slovenia as a trend setter destination

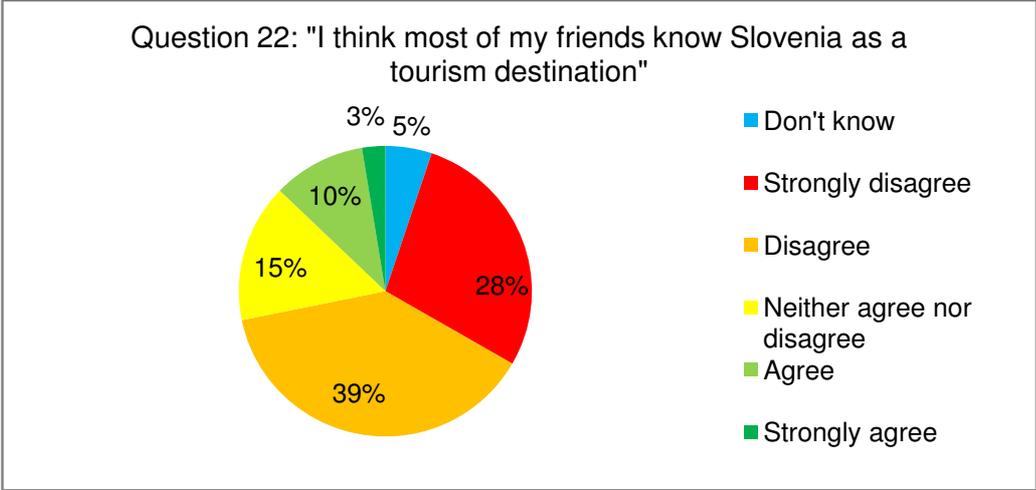


Figure 8.28 Slovenia as a well known destination

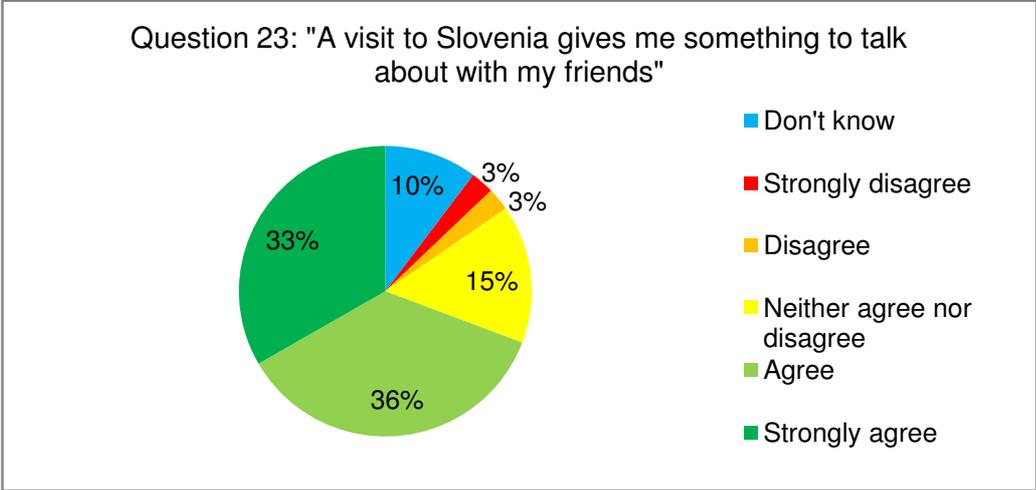


Figure 8.29 Conversational value of Slovenia as a tourism destination

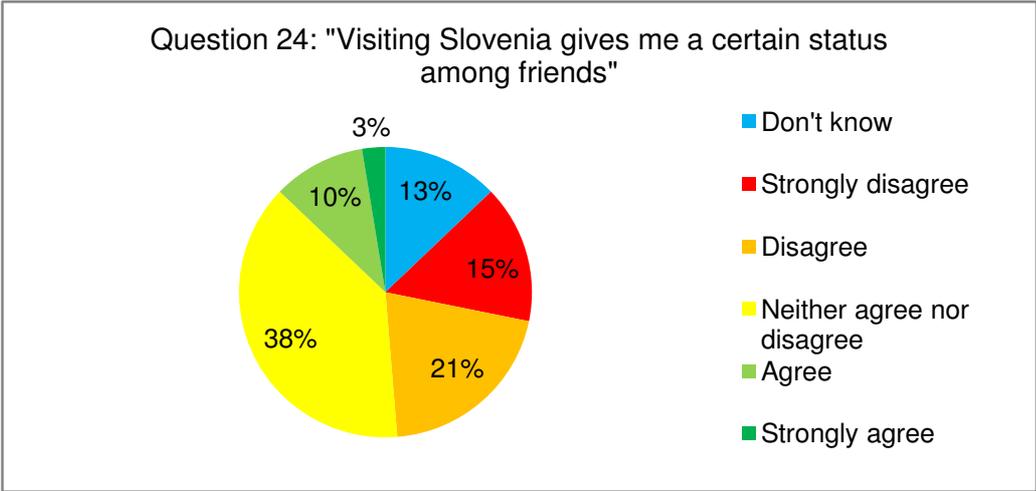


Figure 8.30 Status among friends by visiting Slovenia

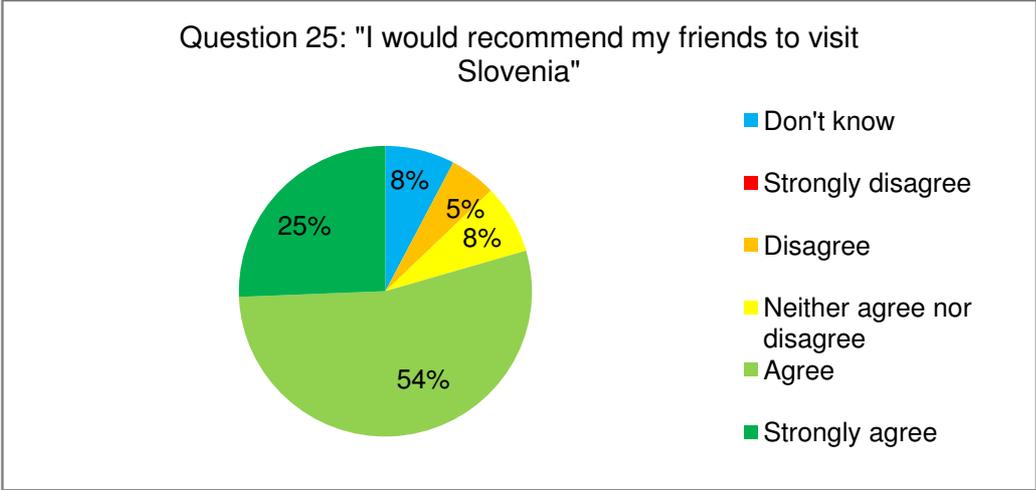


Figure 8.31 Recommend to visit Slovenia

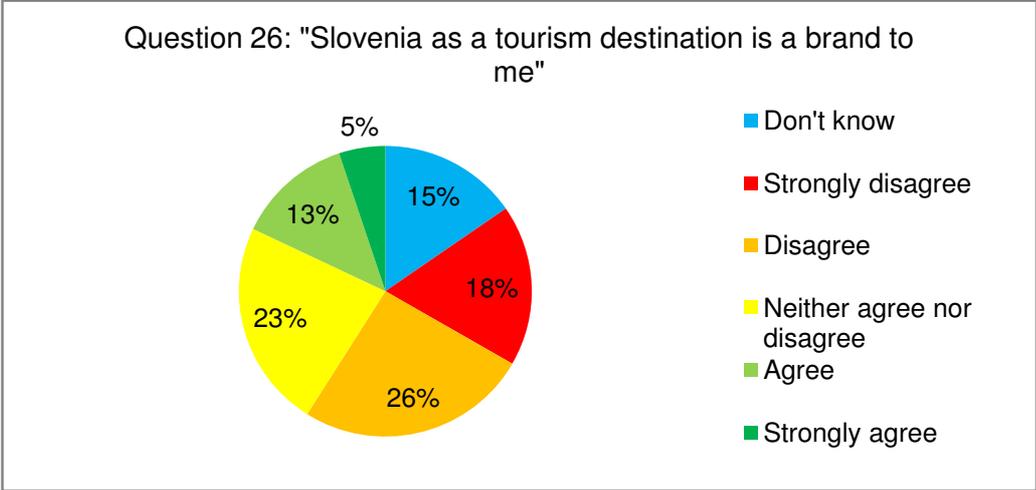


Figure 8.32 Slovenia as a tourism destination as a brand

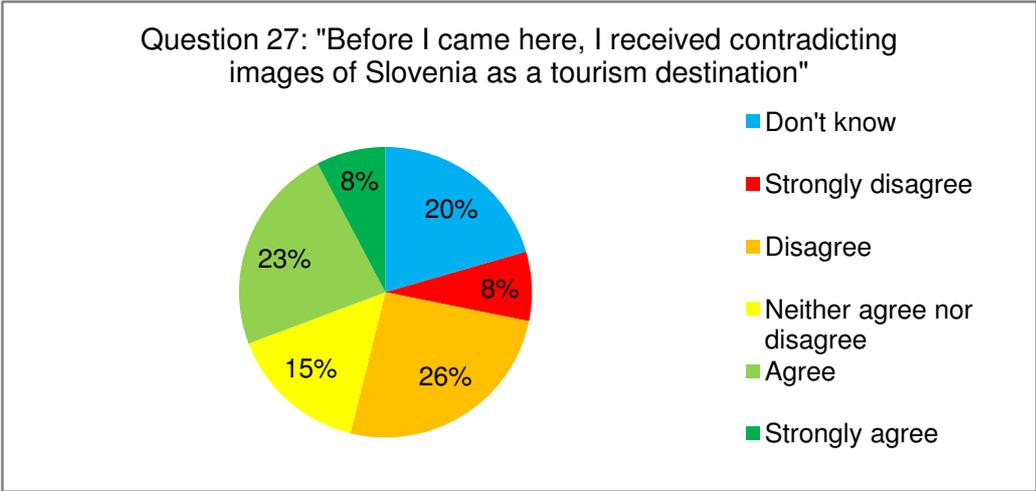


Figure 8.33 Contradicting images of Slovenia as a tourism destination

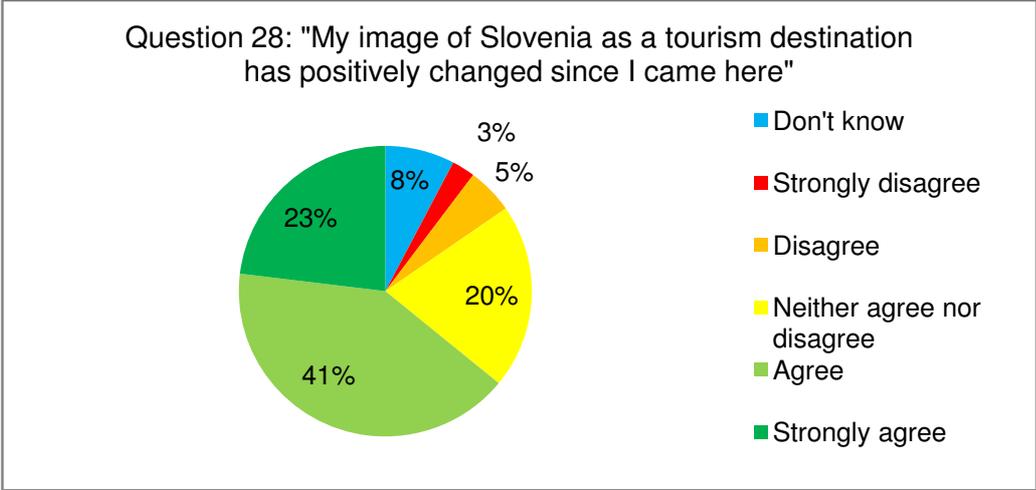


Figure 8.34 Change image of Slovenia as tourism destination during stay

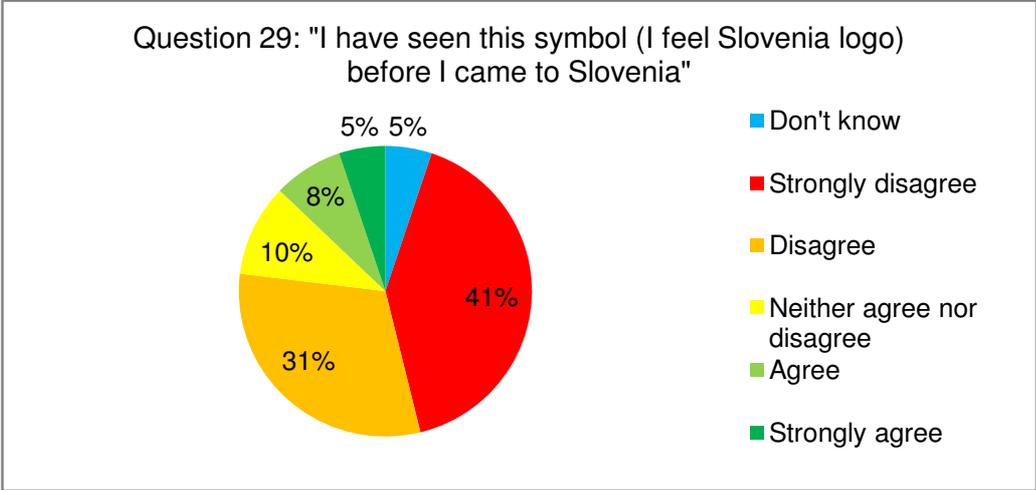


Figure 8.35 Visibility of I feel Slovenia logo before coming to Slovenia

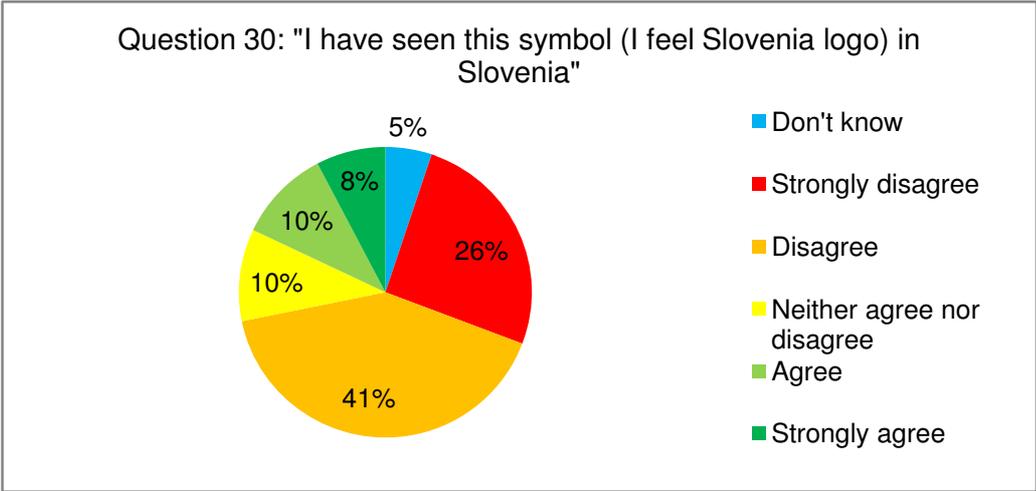


Figure 8.36 Visibility of I feel Slovenia logo in Slovenia

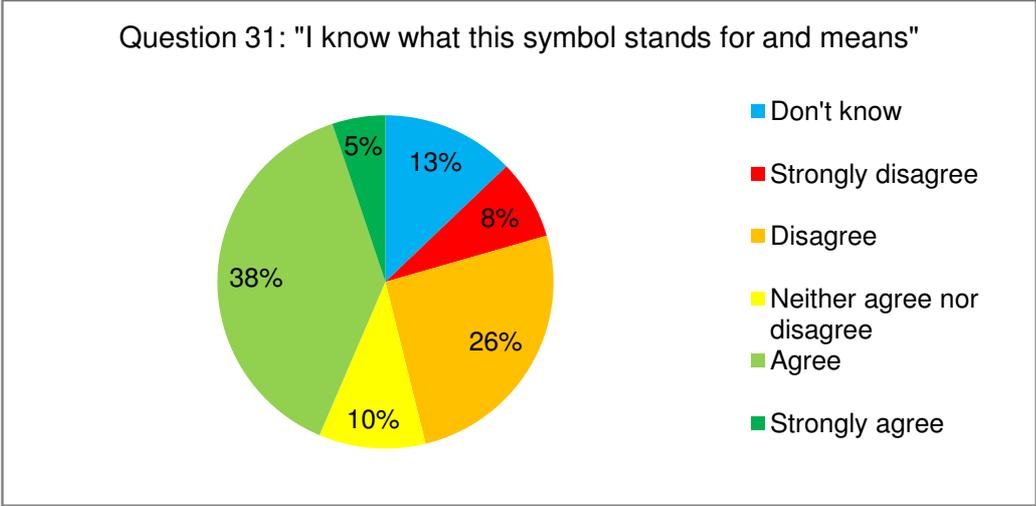


Figure 8.37 Understanding of meaning of I feel Slovenia logo

8.6 Autobiographical statement

Harmen van der Molen was born on the 5th of October 1986 in Nijmegen, the Netherlands. After receiving his Senior General Secondary Education diploma in 2004 he worked and traveled for 5 months in Canada. In 2005, Harmen started with his studies in Integrated Communication Management at the Utrecht University of Applied Sciences, where he has specialized in both Marketing Communication and Public Relations. He studied for a semester at the Haaga-Helia University of Applied Sciences in Helsinki in 2007 and successfully finished a work placement at a marketing department of Douwe Egberts Coffee Systems/Sara Lee in 2008. His interest for the tourism industry is for a main part a result of the summers he spend traveling in Thailand, Mexico, Guatemala and Morocco. After receiving his Bachelor in Communication in July 2009, he will continue to study for a MA in Corporate Communication at the Aarhus School of Business of the Aarhus University in Denmark.

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