A IMAGEM DA ALEMANHA COMO DESTINO DE FÉRIAS: COMPARAÇÃO ENTRE BRITÂNICOS QUE JÁ VISITARAM E QUE AINDA NÃO VISITARAM O PAÍS

Inga Achterkamp

inga.achterkamp@gmail.com

Regional People and Development Administrator for the South, De Vere Venues (UK)

Graduação em Turismo, School of Tourism, Bournemouth University

Teresa Robinson

trobinso@bournemouth.ac.uk

Lecturer in Tourism Economics, School of Tourism, Bournemouth University, UK

Graduação em Turismo, School of Tourism, Bournemouth University

Miguel Moital

mmoital@bournemouth.ac.uk

Senior Lecturer in events Management, School of Tourism, Bournemouth University, UK

Doutor em Turismo, Bournemouth University, UK

Graduado em Turismo, Escola Superior de hotelaria e Turismo do Estoril, Portugal

Correspondência:

Miguel Moital

School of Tourism, Bournemouth University

Dorset House, Talbot Campus

Fern Barrow

BH12 5BB

Poole, Dorset

United Kingdom

RESUMO

O presente estudo analisa as imagens da Alemanha como destino de férias, comparando as imagens de Britânicos que já visitaram a Alemanha com as dos que ainda não visitaram. Dois grupos de foco e análise iconográfica auxiliaram na identificação de atributos relevantes. Residentes de uma cidade localizada no sul da Inglaterra foram questionados sobre a importância de cada atributo na seleção de um destino de férias, bem como sobre o desempenho da Alemanha como destino de férias. Tais dados permitiram efetuar uma análise importância *versus* desempenho, permitindo a conclusão que os pontos mais fortes da Alemanha são as cidades (sightseeing), a limpeza e a acessibilidade. Em relação aos pontos fracos, a Alemanha é vista como pouco atrativa em relação ao clima, praias e preço. Os resultados também indicam que os Britânicos que já visitaram a Alemanha destacam a hospitalidade e o aspeto acolhedor do interior do país, enquanto os não-visitantes não identificam esses fatores como pontos fortes. Adicionalmente, o estudo também sugere que o material promocional parece não exercer influência sobre a decisão de visitar a Alemanha, indicando uma possível ausência de promoção, ou sua ineficácia.

PALAVRAS-CHAVE: Imagem dos destinos, Alemanha, Análise Importância-*Performance*

ABSTRACT

The purpose of this study was to examine the images of Germany as a holiday destination held by British visitors, and those who have not yet visited that country. A review of past destination image studies and two focus groups were used to identify relevant attributes. Residents of a city in the South of England were asked to indicate the importance of each attribute when selecting a holiday destination, and how Germany performs in each attribute. An Importance-Performance model was then developed, in which it was demonstrated that the perceived strengths of Germany are: the towns and cities (sightseeing), cleanliness, and accessibility. On the other hand, the respondents felt that Germany is rather unattractive in relation to climate, beaches and prices. The analysis also showed that British tourists who have already visited Germany highlighted the hospitality and the welcoming atmosphere of the countryside, while non-visitors were generally not aware of these aspects. It was further found that promotional material does not seem to influence the decision to visit Germany, possibly indicating a lack of advertising, or the ineffectiveness of the promotion that is presently carried out.

KEY WORDS: Destination image, Germany, Importance-Performance Analysis

RESUMEN

El presente estudio analiza las imágenes de Alemania como destino de vacaciones, comparando las imágenes de británicos que ya visitaron Alemania con las de los que todavía no lo hicieron. Dos grupos de foco y análisis iconográfico auxiliaron en la identificación de atributos relevantes. Los residentes de una ciudad ubicada en el sur de Inglaterra fueron cuestionados sobre la importancia de cada atributo en la selección de un destino de vacaciones, así como sobre el desempeño de Alemania como destino de vacaciones. Tales datos permitieron efectuar un análisis de importancia *versus* desempeño, permitiendo llegar a la conclusión de que los puntos más fuertes de Alemania son las ciudades (sightseeing), la limpieza y la accesibilidad. En relación a los puntos débiles, Alemania es vista como poco atractiva en relación al clima, playas y precio. Los resultados también indican que los británicos que ya visitaron Alemania destacan la hospitalidad y el aspecto acogedor del interior del país, mientras que los no-visitantes no identifican esos factores como puntos fuertes. Adicionalmente, el estudio también sugiere que el material promocional parece no ejercer influencia sobre la decisión de visitar Alemania, indicando una posible ausencia de promoción, o su ineficacia.

PALABRAS CLAVE: Imagen de los destinos, Alemania, Análisis Importancia-*Performance*

1 INTRODUCTION

With an annual turnover of €1.55 billion, tourism is an important contributor to the German economy (GNTB, 2006a). The industry is, however, dominated by domestic tourists and there is considerably less international inbound tourism (17% of all tourists). For British holiday-makers Germany is low on the list of favoured destinations (rank 10) and this is despite the British rising propensity to travel over the last years (GNTB, 2007). According to the GNTB (2007) Germany only has a share of 1% of UK outbound holiday tourism and current trends suggest that UK visitor arrivals are stagnating: a peak was reached in 2000 (1.9 million arrivals), but visitor arrivals have since fallen to 1.88 million in 2005. Arguably, the deficit of British holidaymakers in Germany is due to the country's outdated image and the lack of knowledge about the modern Germany and its people (BBC, 2004; GFK GROUP, 2003; DAESCHNER, 2006).

Note: An earlier version of this paper was presented at the 2nd Tourism International Congress, 19-20 November 2008, Leiria Polytechnic Institute, Portugal.

It is generally recognised that an understanding of the images people have of destinations is of high value since these affect decision-making (CHON, 1990). Growing international tourism, fierce competition among destinations and changing consumer profiles have all contributed to the increasing interest of destination marketers in how to build or reinforce positive images of their countries. Furthermore, it is due to the intangible nature of tourism that destinations primarily compete via images. The challenge for academics and marketers alike lies in finding ways to examine these images as well as their influencing variables (BALOGLU and MCLEARY, 1999a). Thus, the aim of the study on which this paper is based was to assess the image of Germany as a holiday destination in the UK. More specifically, the research objectives were:

• to determine salient holiday destination attributes for Germany

• to examine the importance of attributes and the performance of Germany as a holiday destination

• to ascertain whether there are differences in perceptions between actual and potential tourists

• to make recommendations which can aid German tourism marketers to portray meaningful images in the UK market.

The article starts with a brief overview of previous research into destination image, its formation and its measurement. The literature review also informs the methodology, which is described in the next chapter. This is followed by the presentation and discussion of the research findings. Finally, conclusions and implications are outlined.

2 LITERATURE REVIEW

2.1. Destination image and image formation

Since the importance of destination image for destination competitiveness was recognised in the 1970s, the topic has widely occurred in a wide body of tourism literature. Most of these studies have acknowledged the difficulty of an operational definition and indeed, Pearce (1982) commented that "image is one of those terms that will not go away, a term with vague and shift meanings" (p. 64). According to Witt and Moutinho (1995), "images are not necessarily based on experience or fact" (p. 336). This suggests that individuals can perceive destinations in a specific way although they know little about them. In other words, conceptions of reality are formed even when direct experience is absent. As found by Pike (2002), who reviewed 142 papers about destination image analysis, the central assumption in image studies is that destination image plays a crucial role in an individual's travel decision making. Image even can become the decisive factor when prices and accessibility are comparable (GOODALL 1992; O'LEARY and DEEGAN, 2005).

In their review of destination image studies, Echther and Ritchie (1993) concluded that destination image studies tended to evaluated only the cognitive components. Yet, they argued that destination image is much more complex and also includes affective components. Perceptual/ cognitive evaluations refer to beliefs and knowledge about an object whereas affective evaluations refer to feelings about it. These evaluations are influenced by factors from the environment and by personal characteristics (BALOGLU and MCLEARY (1999b). Regarding sociodemographic variables, Baloglu and McCleary asserted that age and education appear to be the most influential on image formation. This suggests the importance of assessing the role of image and its interaction with other variables in order to provide an understanding of the decision-making process (SIRAKAYA, SONMEZ and CHOICE, 2001).

One of the common methodologies for understanding destination image is the pull-push framework (CHON, 1990). The underlying assumption is that consumers have certain needs (push factors) that can be satisfied through consuming products. Consumers evaluate each competing offer by looking at the extent to which each alternative is able to satisfy their push motives. The characteristics and features of each competing destination are compared against the push motivation to identify which one is more attractive (i.e. the one that exerts a greater pull). According to the model, the most appealing destination (i.e. destination that exerts a greater pull) is likely to be selected.

An important point with regards to the link between image formation and motivation was brought forward by Goossens (2000), who explained that images of desirable future events tend to foster the behaviour most likely to bring about their realisation. Arguably, motivation is intertwined with imagery, and several authors (MAYO 1973;n VAUGHAN and EDWARDS, 1999; AMOAMO and BOYD, 2005) have stressed that it is not the reality that motivates an individual to travel but images. The question arising for destination marketers is therefore how this image can be managed in order to match expectations with reality.

If the buying decision is linked to the image held by the traveller, an examination of the image formation process can help understand how a tourism marketer can influence the individual's perception of the destination (CHON, 1990). However, Gallarza *et al* (2002) denoted that after three decades of research the debate over the image formation process is still not settled. Gunn (1988) identified three elements of image forming: the organic image is based on non-touristic sources such as fictional and non-fictional books, films (e.g. Lord of the Rings, City of God), reports of world events or word-of-mouth. The induced image is derived from the destination's marketing itself, for example through promotional material it can combat the possible negative organic image. This is the image a destination can attempt to control and influence. Finally, the experiential image is based on the personal experience of the destination. The single most important benefit of this classification scheme is that it differentiates between the images that can be influenced by the destination through communication from those that cannot.

Whether the experiential image is positive or negative will depend on the degree of match between the pre-visit image (organic + induced) and the image resulting from the actual experience. Chon (1990) found that the most positive evaluation will result from a negative pre-visit image and a positive experience, whereas a positive pre-visit image and a negative experience will result in the most negative evaluation. Results of incongruity underscore the need for tourism boards to ensure compatibility of image and reality in order to encourage repeat visits and to avoid damaging word-of-mouth.

2.2. Destination image measurement

As mentioned previously, the definition of destination image is problematic and highly complex. Inevitably, the lack of agreement about the conceptualisation of perceived destination image has given rise to great heterogeneity in its measurement (BEERLI and MARTIN, 2004). Pike (2002) found that destination image research has been fragmented and is lacking an accepted theoretical base. He identified a variety of methodologies, which differ 1) in the data collection method and 2) in the use of attribute lists.

Dann (1996) stated that there has been recurring criticism of the use of attribute lists and it has been observed that in several instances the validity and reliability of the scales were not established. Beerli and Martin (2004) pointed out that the choice of the different attributes used in a study will depend on the attractions of the destination, on the destination's positioning and on the objectives of the assessment of perceived image. Therefore, a generalisation of attribute lists is not possible and researchers who solely depend on secondary sources in creating items for questionnaires have received much criticism (PIKE, 2002; RYAN and CAVE, 2005). Hence, it is not surprising that several authors (CHAGAS, 2008; RYAN and CAVE, 2005; PIKE, 2003; COSHALLI, 2000; ECHTNER and RITCHIE, 1993) have called out for preliminary phases of qualitative research to distil the constructs used by the study population.

Few studies address subjects to elicit descriptions of image informed by prior notions of image construct. Ryan and Cave (2005) highlight the repertory grid analysis (RGA), which is theoretically underpinned by George Kelly's (1955) personal construct psychology as a suitable method. This method allows individuals to use their own language to describe what is relevant to them. Authors who implemented this method (e.g. COSHALL, 2000; PIKE, 2003; HANKINSON, 2004) argued that RGA is more likely to produce valid data than data generated by structured questionnaires and that it aids tourism marketers to promote a destination by projecting an image that appears desirable to potential users, thus enabling destinations to fulfil their tourist potential.

According to Jenkins (1997) the compilation of relevant attributes can be followed by a quantitative phase of research in which tourists can be asked to rate a destination according to

the constructs distilled in the qualitative phase. He suggests a process where the respondent can first rate the personal importance of a particular construct ("construct preference") and second, evaluate a destination according to the particular construct ("evaluative perception"). This will allow the determination of the real drivers with respect to overall satisfaction with the destination (JOPPE, MARTIN and WAALEN, 2001). A valid technique, introduced by Martilla and James (1977) is Importance-Performance Analysis (IPA). This technique identifies strengths and weaknesses of a product or service by comparing the two criteria that consumers use in decision-making: the importance of attributes and the evaluation of the offering in terms of those attributes. Consequently, results can be plotted on a grid with four quadrants (Figure 1) and each quadrant suggests a different marketing strategy (Joppe *et al.*, 2001).

Pike and Ryan (2004) utilised IPA to measure the cognitive perceptions of visitors to New Zealand and argued that "understanding how well a destination's features perform is not sufficient to determine positioning if they are not also evaluated in terms of importance to the traveller" (p. 335). This is fundamental to understand the meaning of either positive or negative responses to attributes (O'LEARY and DEEGAN, 2005). Joppe *et al.* (2001) applied IPA to the image of Toronto and successfully identified not only strengths of the destination but also gaps in its marketing strategy.

Figure 1: Importance-Performance Grid (O'LEARY and DEEGAN, 2005)

P E R F O R M A N C E

	QUADRANT 1 Concentrate here High Importance Low Performance	QUADRANT 2 Keep up the good work High Importance High PerformanCe
I M P O R T A N C E	QUADRANT 3 Low priority Low Importance Low Performance	QUADRANT 3 Possible overkill Low Importance High Performance

3 METHODOLOGY

3.1. Questionnaire Design

A structured group interview and iconographical analysis were employed to elicit salient attributes of Germany as a holiday destination. The focus group contained eight participants, aged between 35 and 50 with middle/upper income levels, thus mirroring the typical British visitor profile to Germany. The operationalisation of RGA started with the selection of homogenous elements, in this case European holiday destinations. The group was then shown three of the countries' names on cards and the following question was asked: *"If you were considering a holiday, in what important way are two of these destinations alike, and different to the third?"* Because Germany was the special focus of this study, its name appeared more often than the others. If Germany did not appear in a triad, the group was asked to evaluate it with regards to the constructs created for the other countries. All participants were encouraged to supply more than one similarity/difference for each triad and repeated statements were permitted. A total of 77 constructs was collected and content analysis was used to analyse the gathered data.

Iconographic analysis was undertaken through analysing the contents of the GNTB website and nine brochures available from the GNTB to potential tourists in the UK. The focus was on identifying the key themes used to promote Germany. Attempts were also made to obtain brochures from several travel agents but this appeared difficult as none of the approached travel agents held brochures just for Germany.

The results generated from the initial qualitative research (Focus group and iconographic analysis) were used to design the first section of the questionnaire, which was constructed using a five point Likert scale. Respondents were asked to first rate the importance of certain attributes and then rate Germany's performance with regards to these attributes. Next, the questionnaire asked respondents to what extent they are acquainted with Germany and how likely they would consider a future visit to Germany. An open-ended question was used to allow respondents to use their own words when describing Germany. The last section was concerned with demographic profile of the respondents.

3.4. Data collection

Data from the GNTB (2006b) shows that the average age of British tourists is 43 years and therefore participants around this age and of British nationality were selected for the Focus Group. For the survey, respondents were again required to be of British nationality and a proportion of past visitors (have been to Germany before) and non-visitor (never been to Germany) were required. Both past and non-visitors were included in the sample for the reason that this study wanted to understand the extent to which those who hold experiential images are different from those who only hold organic/induced images. Chon (1990) argued that past and non-visitors may hold different images of a destination. This is in stark contrast to the fact that most tourist organisations only appraise holidaymakers' reactions on a postvisitation basis (O'LEARY and DEEGAN, 2005). Moreover, Baloglu and McCleary (1999a) mention that many destination researchers fail to control familiarity in their studies, and indeed their research into visitors and non-visitors to the Mediterranean indicates a significant difference between past and non-visitors. Awaritefe (2004) also discussed this in a study of different images of actual and prospective tourists to Nigeria and he concluded that it is crucial to measure the expectations of prospective tourists as these differ from past tourists in terms of image and motivation. Therefore, this study has considered the view of both past and non-visitors.

In order to minimize bias, respondents were not targeted at the destination as practised by the majority of image researchers but at their place of residence. Residents at a Southern England mid-sized city were approached while walking in the centre of the city and asked to answer the questionnaire. A total of 100 respondents participated in the study. Of all respondents 40% had been to Germany on one or more occasions. Furthermore, the distribution among the age groups and male/female ratio was desired to be similar to national demographics (excluding 0 – 17 year olds) in order to be able to draw some conclusions on the perceptions of British citizens. In order to minimize bias, respondents were not targeted at the destination as practised by the majority of image researchers but at their place of residence. The demographic characteristics of the sample are outlined in table 1.

Table 1: Demographic Characteristics of the Sample in percentages (n = 100)

		Sample	UK
Gender	Male	44	48.6
	Female	56	51.4
Age	18 – 24	19	8.1
	25 – 34	29	19.1
	35 – 44	20	20.1
	45 – 54	13	17.8
	55 and over	19	34.7
Employment status	Employed	68	61.7
	Self – employed	6	8.3
	Student	16	4.6
	Unemployed/Sick	3	8.6
	Retired	7	13.5

Source: National statistics, 2001 (UK data)
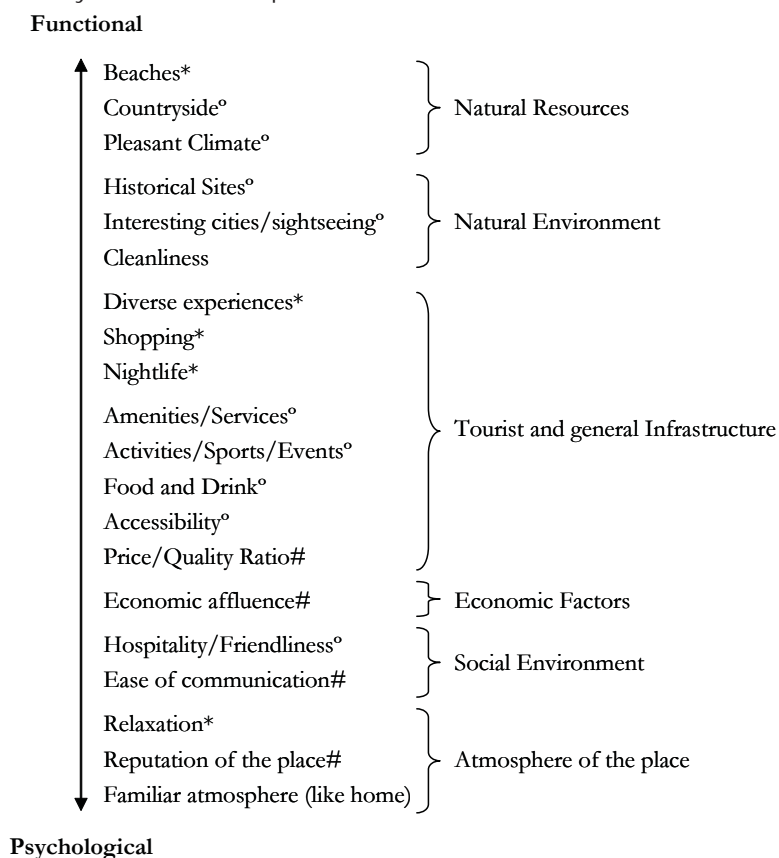
3.5. Data analysis

Content analysis was used to analyse the results from the Focus Group and the Brochure analysis. The 77 constructs collected through RGA were grouped into categories while the brochure analysis involved classifying the occurring themes in photographs and catchphrases and measuring the frequency with which they occur. The findings were then compared to each other and to attributes used in previous studies. The survey data were analysed using SPSS. The Mann-Whitney test was carried out in order to assess whether there are statistically significant differences between the scores at the 0.05 level. Importance-Performance Analysis was used to compare the ratings of previous visitors and nonvisitors and to identify strengths and weaknesses of Germany as a holiday destination.

4 RESULTS

4.1. Attribute list for Germany

The final list of attributes developed for Germany is shown in figure 2. The analysis of the results of RGA revealed that the most frequently occurring attributes were 'Beautiful scenery' and 'Economic affluence'. However, other attribute lists (e.g. ECHTNER and RITCHIE, 1993; PIKE, 2003) also comprise a number of attributes seemingly not relevant for Germany as they were not mentioned throughout the Focus Group. 'Beaches', 'Diverse Experiences', 'Shopping', 'Nightlife' and 'Relaxation' were not derived in the Focus Group but because of their recurring appearance in the brochures it was decided to include them in the attribute list. Apart from 'Diverse Experiences' all the attributes derived from the focus group and brochure analysis occur in Echtner and Ritchie's (1993) attribute list.

Figure 2: Content Analysis of Focus Group Results and Brochures

Functional

Beaches*
Countryside°
Pleasant Climate° } Natural Resources

Historical Sites°
Interesting cities/sightseeing°
Cleanliness } Natural Environment

Diverse experiences*
Shopping*
Nightlife*
Amenities/Services°
Activities/Sports/Events°
Food and Drink°
Accessibility°
Price/Quality Ratio# } Tourist and general Infrastructure

Economic affluence# } Economic Factors

Hospitality/Friendliness°
Ease of communication# } Social Environment

Relaxation*
Reputation of the place#
Familiar atmosphere (like home) } Atmosphere of the place

Psychological

Note: * Derived from Brochure Analysis; # Derived from Focus Group; ° Derived from Both

4.2. Importance and Performance Ratings of Attributes

The establishment of the attribute list provided the foundation for the questionnaire. Respondents were asked to rate each of the 20 attributes on a Likert scale of 1 – 5 according to the importance of the attribute when choosing a holiday destination. They were then asked to rate each attribute according to how they thought Germany would perform. The mean was calculated and the results are presented in Table 2, according to the ranking of the importance mean scores.

Table 2 – Importance and performance ratings compared

Rank	Attribute	Importance (mean)	Performance (mean)	Difference be-tween means
1	Food and Drink	4.15	3.75	-0.40
2	Climate	4.11	3.20	-0.91
3	Price/Quality ratio	4.08	3.40	-0.68
4	Hospitality/Friendliness	4.00	3.36	-0.64
5	Cleanliness	3.94	4.02	0.06
6	Relaxation	3.91	3.36	-0.55
7	Cities/Sightseeing	3.84	4.07	0.23
8	Accessibility	3.75	3.96	0.21
9	Amenities/Services	3.66	3.77	0.11
10	Diverse experiences	3.64	3.35	-0.29
11	Countryside	3.58	3.58	0
12	Beaches	3.46	2.34	-1.12
13	Ease of communication	3.45	3.38	-0.07
14	Reputation	3.34	3.23	-0.11
15	Historical Sites	3.19	3.83	0.74
16	Activities/Sports/Events	3.13	3.52	0.39
17	Nightlife	2.82	3.46	0.64
18	Shopping	2.71	3.48	0.77
19	Economic affluence	2.59	3.65	1.06
20	Familiar Atmosphere	2.35	2.93	0.58

The results show that the most important attributes were, in descending order of importance, 'Food and Drink', 'Climate' and 'Price/Quality ratio'. The performance ratings show quite some divergence from the importance ratings. Respondents felt that Germany would perform best with regards to 'Cities/Sightseeing', 'Cleanliness' and 'Accessibility'. It is positive that all these attributes also rank in the top half of the importance ratings. The highest discrepancies between the importance and performance ratings were found with regards to 'Climate', 'Beaches' and 'Price/Quality ratio'. This suggests that visitors perceive Germany as rather unattractive regarding the climate and the availability of beaches and as relatively expensive. A number of respondents also wrote 'not applicable' next to 'Beaches' suggesting a lack of knowledge in believing the country is landlocked. There is further a striking perceived underperformance of Germany concerning the top four most important attributes and an over performance concerning the attributes at the bottom of the importance scale (as indicated by the – and + signals, respectively).

4.3. Importance-Performance Analysis by type of image

In order to assess whether there are differences between previous visitors and nonvisitors, the respective importance and performance scores were plotted on an IPA grid (Figure 3). The respective mean values were used as coordinates to determine the placement of each attribute.

Figure 3: Importance and performance scores according to previous experience with visiting Germany
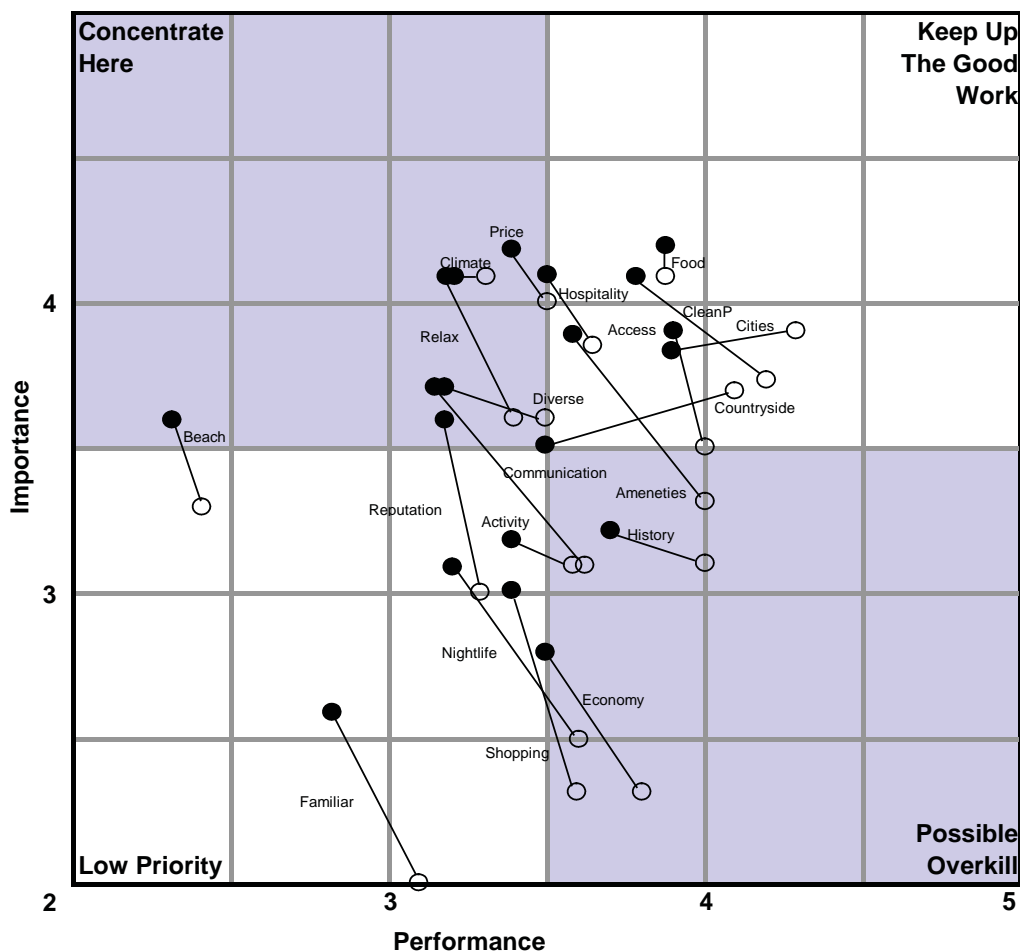
When comparing the grids for previous and nonvisitors there are some interesting differences in the distribution of the attributes. For the purposes of interpretation, the 3.5 score was adopted as the cut-off point for establishing the quadrant to which one attribute belongs to. The 'concentrate here' quadrant for nonvisitors received many more attributes (8) when compared to previous visitors (4). Both contain the attributes 'Climate', 'Price/Quality ratio', 'Relaxation' and 'Diverse experiences'. This suggests that there is a need for destination marketers to improve these areas. In contrast, there are some areas that only need improvement when attracting first-time visitors. This concerns specifically 'Hospitality/Friendliness' and countryside.

The 'possible overkill' quadrant for nonvisitors received only two attributes ('Historical Sites' and 'Economic affluence') while the one for previous visitors received six attributes. This is worrying because previous visitors may not want to return as their needs are more than saturated. Thus, fewer resources can be expended to improve these attributes.

The 'keep up the good work' quadrant for previous visitors received six attributes: 'Food and Drink', 'Hospitality/Friendliness', 'Cleanliness', 'Cities/Sightseeing', 'Accessibility' and 'Countryside'. These areas have been identified as Germany's main strengths and efforts can be made to constantly maintain and improve these areas. The quadrant for nonvisitors received similar attributes except 'Hospitality/Friendliness' and 'Countryside'.

Attributes in the 'Low priority' quadrant are considered less important and are not performing very well. Therefore they have no immediate priorities. However, there are again differences when targeting previous or first-time visitors. 'Beaches' and 'Reputation', for example are 'low priority' for previous visitors but are found in the 'concentrate here' quadrant for nonvisitors.

The Mann-Whitney test was carried out in order to identify if importance and performance scores were different between the two subgroups (Table 3). Significant differences in the performance

ratings were found with regards to 'Countryside' (Z=-3.050; p<0.01), 'Cities/sightseeing' (Z=-2.383; p<0.05), 'Cleanliness' (Z=-2.136; p<0.05), 'Shopping' (Z=-2.279; p<0.05), 'Nightlife' (Z=-2.261; p<0.05), 'Amenities/Services' (Z=-2.765; p<0.01) and 'Communication' (Z=-1.973; p<0.05). As the mean rank values show, previous visitors considered Germany performing better than nonvisitors in all cases.

Table 3: Differences between visitors and nonvisitors regarding the performance of Germany as a tourist destination (Mann-Whitney)

	Z	Mean Rank		Sig.
		nonvisitors	visitors	
Beaches	-0.580			
Countryside	-3.050	43.8	60.5	0.002
Pleasant Climate	-0.443			
Historical Sites	-1.660			
Interesting cities/sightseeing	-2.383	45.6	57.9	0.017
Cleanliness	-2.136	45.8	57.6	0.033
Diverse experiences	-1.701			
Shopping	-2.279	45.6	57.9	0.023
Nightlife	-2.261	45.5	58.0	0.024
Amenities/Services	-2.765	44.7	59.3	0.006
Activities/Sports/Events	-1.089			
Food and Drink	-0.145			
Accessibility	-0.696			
Price/Quality Ratio	-0.664			
Economic affluence	-1.867			
Hospitality/Friendliness	-0.907			
Ease of communication	-1.973	45.5	56.6	0.048
Relaxation	-0.773			
Reputation of the place	-0.647			
Familiar atmosphere (like home)	-1.721			

4.4. Congruity of images

Respondents who have been to Germany before were asked whether their visit exceeded, matched or fell short of their expectations. When applying these results to Chon's (1990) suggested relationships between perceived image and reality, it can be said that none of the visitors occurred negative incongruity and subsequent high dissatisfaction (resulting from a positive pre-visit image and negative perceived reality). The majority of visits occurred congruity (60%), while 40% of visitors occurred positive incongruity and subsequent high satisfaction. When asked how the visit exceeded their expectations the responses were very similar: all were concerned with either friendlier people than expected or prettier countryside than expected. The latter supports the earlier findings that there are significant differences between visitors and nonvisitors when evaluating 'Countryside'.

4.5. Likelihood of future visits

The Mann-Whitney test was performed in order to check for a difference in the likelihood of a future visit between visitors and nonvisitors. The result suggests that nonvisitors are significantly less likely to visit Germany on a future holiday than previous visitors (Z=-4.132; p<0.001). These findings are consistent with research carried out by Baloglu and McCleary (1999a) and Awaritefe (2004), who found that previous visitors usually have a more positive image of the destination they visited than nonvisitors.

Respondents who said they would not consider visiting Germany in the future were asked for their reasons (Table 4). The overwhelming majority of respondents indicated that Germany simply does not appeal to them. Many of the additional comments on the questionnaires also underlined this statement. Although only a few respondents stated that there is not enough information about Germany, some

of the additional comments stress this point: *"Germany has so much to offer and people in UK don't know about it"; "Not advertised enough!"; "It is not a destination I have ever seen advertised as a holiday resort"; "Germany is not promoted as a holiday destination"*. This corresponds with the high number of respondents (49%) who indicated: 'I know hardly anything about Germany'.

Table 4: Reason for not considering German as a Holiday Destination in the Future

	N	%
Does not appeal to me as a holiday destination	17	54.8
See other places first	6	19.6
Age/Health Reasons	5	16.1
Not enough information about Germany	3	9.7
Total	31	100

5 DISCUSSION AND CONCLUSIONS

The purpose of this study was to examine the image of Germany as a holiday destination in the UK and the influences upon this image. This aim was achieved by 1) determining 20 destination attributes through Repertoire Grid Analysis, 2) conducting and analysing a questionnaire of 100 participants, 40 of which have been to Germany on one or more occasions. Consequently, differences in perceptions and influencing factors were examined and analysed with the help of Importance-Performance Analysis and bivariate statistical tests.

The research findings lead to the conclusion that the destination image of Germany held by the sample is dependent on whether the individuals have previously visited the country or not. IPA of nonvisitors has shown that they do not perceive Germany as a destination that can satisfy their needs. Conversely, the images of previous visitors are largely congruent with their drivers of satisfaction. It appears, therefore, that Germany is able to satisfy its visitors' needs but that the country is not communicating this to potential visitors. As pointed out by Joppe *et al* (2001) "by linking the drivers of satisfaction with the image of the destination that is portrayed, it is possible to focus on the key attributes that will ensure that the destination can meet or exceed the visitor's expectations" (p.58). For Germany this would mean continuing emphasis on food and drink, cities and sightseeing and cleanliness while necessitating measures to improve relaxation opportunities and the price/quality ratio and to raise awareness of nonvisitors about outstanding hospitality and beautiful countryside.

Unawareness of Germany as a holiday destination in UK has been a recurring issue throughout the research. Firstly, the authors were unable to obtain brochures specifically advertising Germany at travel agents. Secondly, half of the respondents indicated that they had hardly any knowledge about Germany. Thirdly, it was found that hardly any respondent had an induced image (influenced by advertising) of Germany and if they did, this did not influence their decision to visit the country. Last, a striking number of comments were obtained acknowledging that Germany is not promoted as a holiday destination. The lack of knowledge was also mirrored by inaccurate images, such as the belief that Germany has no beaches.

However, those people who did visit the country were highly satisfied and their positive experiences have seemingly an affect on friends and relatives as this was found to be a key variable when considering to visit Germany. Figure 4 shows a diagram that attempts to illustrate what influences Germany's image and the likelihood of visiting Germany as a holiday destination.

Word-of-mouth recommendations have been found to be the only stimulus factor positively influencing the image of Germany and consequently the decision to choose Germany as a holiday destinations. Furthermore, the younger age groups are more likely to visit the country when their image of Germany is positive. The diagram also aims to confirm the assumption made by Witt and Moutinho (1995) that images even exist in the absence of factual knowledge, although this may be subconscious. When respondents, who have not been to Germany, were challenged to think about their perceptions of Germany most of them concluded that Germany would not satisfy their holidaying needs, i.e. the push and pull factors necessary to bring about motivation to visit the destination (CHON, 1990) did not co-exist.

Figure 4: Influencing factors on Germany's Image and the Likelihood to visit Germany as a Holiday Destination
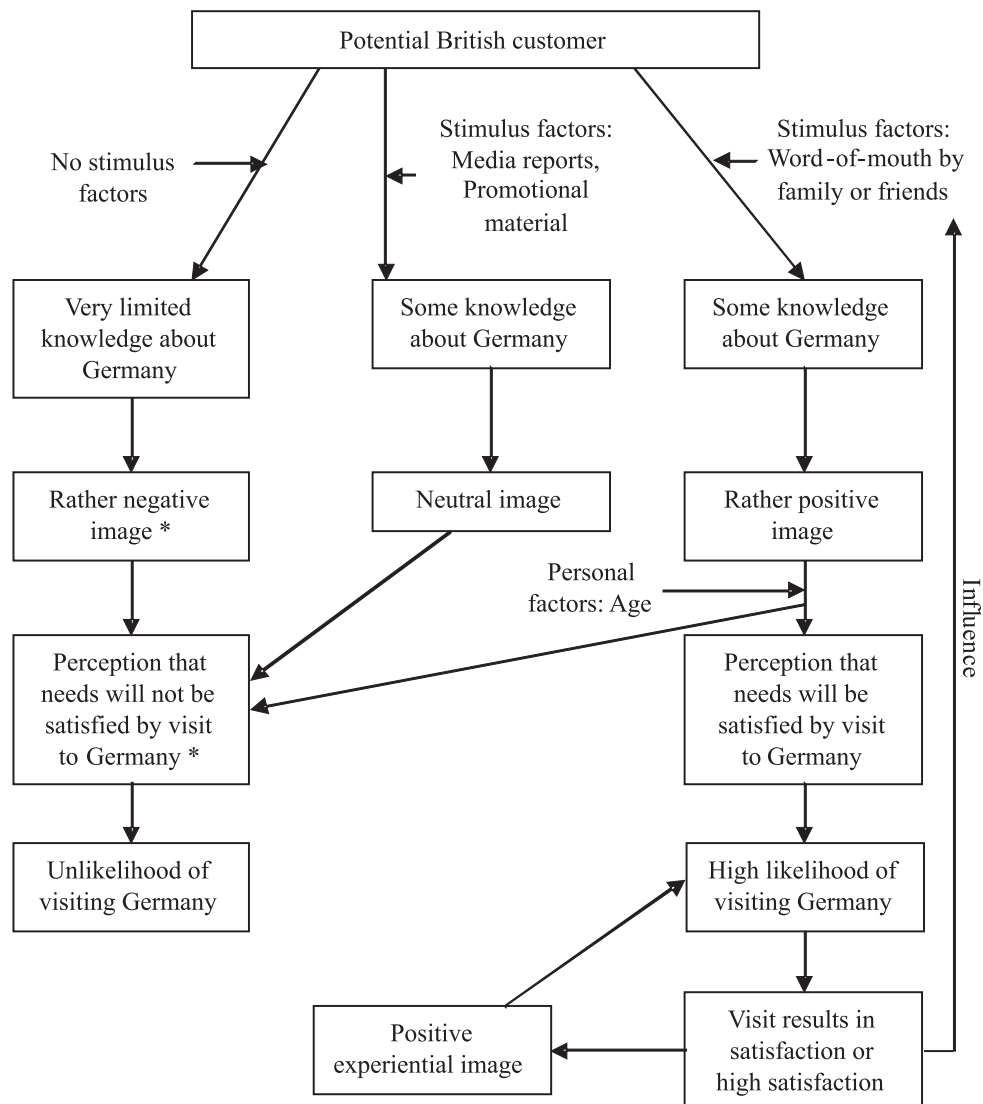
* This process can happen subconsciously

Goossens (2000) stated that images of desirable events tend to foster the behaviour most likely to bring about their realisation – it may be the task of the GNTB to try and match the image of Germany to the expectations of potential visitors in order to increase visitors from UK.

5.1. Recommendations

In light of the above results and limitations, it is recommended that the GNTB focuses on communicating and portraying an image of outstanding hospitality and beautiful countryside. Furthermore, it is suggested that people are made aware of the potential of Germany's beaches through marketing communications. At the same time city trips can be further encouraged, as these are one of Germany's strengths. Some steps have already been taken to reposition the country (such as the London underground campaign) but seemingly the studied sample has not been reached by any advertising campaigns. It is suggested that the GNTB capitalises on the interaction between advertising and photography and implements more specific advertising rather than attempting to convey an 'everything for everyone' image. For example, the Brandenburg gate could appear on all brochures to ensure recognition by potential tourists, similar to what the Sydney Opera House does for Australia. In terms of segmentation, it is recommended to target the younger age groups rather than the 45+ age group; however more specific research into this is needed.

During the Football World Cup 2006 Germany already had the world's attention, so now is the time to build on this image and to ensure that UK visitors are aware of the country's potential not only through word-of-mouth but also through other organic and induced sources. This will increase the self-confidence of potential visitors in terms of reducing their perceived risk, thus raising their expectations, which in turn creates a competitive advantage for Germany.

It is suggested that further research concentrates on the image of Germany in other countries in order to identify perceptions of tourists from different parts of the world. Furthermore, the relative position of Germany among competing destinations can be explored as this would provide a frame of reference and allows for more effective positioning. As highlighted in this study, qualitative methods are of high value to support quantitative research and it is recommended to use these in further image research.

5.2. Limitations

This study was undertaken after careful selection of research methods. Qualitative methods were used in the early phase of research in order to develop a valid attribute list. Furthermore, this study targeted consumers at their place of residence and not at the destination, thus removing bias. However, the findings of this paper should be interpreted with its limitations in mind. The sampling method used was non-probability sampling, meaning that the validity of the results has not been ascertained, and a small sample size was obtained. Consequently, the findings are not generalisable beyond the selected sample. Future researchers could use a larger and more representative sample in order to test the findings of this study and to reinforce the validity of the recommendations to the industry.

6 REFERENCES

AMOAMO, M. and BOYD, S., 2005. Shifting Images: An Historical and Contemporary View of Tourism in the Northwest Territories of Canada. *Tourism and Hospitality Planning and Development,* Vol. 2 (1), pp1-15.

AWARITEFE, O., 2004. Motivation and Other Considerations in Tourist Destination Choice: A Case Study of Nigeria. *Tourism Geographies,* Vol. 6 (3), pp303-330.

BALOGLU, S. and MCCLEARY, K., 1999a. U.S. International Pleasure Travelers' Images of Four Mediterranean Destinations: A Comparison of Visitors and Nonvisitors. *Journal of Travel Research,* Vol. 38 (November), pp144-152.

BALOGLU, S. and MCCLEARY, K., 1999b. A model of destination image formation. *Annals of Tourism Research.* Vol. 26 (4), pp868-897.

BBC NEWS, 2004. *Germany rejects 'goosestep' image* [online]. London: BBC. Available from: http://news.bbc.co.uk/1/hi/world/europe/3758982.stm [Accessed 11 April 2007]

BEERLI, A. and MARTIN, J., 2003. Tourists' characteristics and the perceived image of tourist destinations: a quantitative analysis – a case study of Lanzarote, Spain. *Tourism Management,* Vol. 25, pp623-636.

CHAGAS, M. M., 2008. Imagem de Destinos Turisticos: Uma Discussão Teórica da Literatura Especializada. *Visão e Ação,* Vol. 10 (3), pp435-455.

CHON, K., 1990. The Role of Destination Image in Tourism: A Review and Discussion. *The Tourist Review,* Vol. 45 (2), pp2-9.

COSHALL, J., 2000. Measurement of Tourists' Images: The Repertory Grid Approach. *Journal of Travel Research,* Vol. 39 (August), pp85-89.

DAESCHNER, J., 2006. *Eurotripping.* London: Century

ECHTNER, C. and RITCHIE, J., 1993. The Meaning and Measurement of Destination Image. *Journal of Tourism Studies,* Vol. 2 (2), pp2-12.

GALLARZA, M., SAURA, I. and GARCIA, H., 2002. Destination Image. Towards a Conceptual Framework. *Annals of Tourism Research,* Vol. 29 (1), pp56-78.

GFK GROUP, 2003. *Mutual Perceptions Research UK* [online]. Nuremberg: GfK Group. Available from: http://www.german-embassy.org.uk/Mutual_Perceptions_Key-findings_UK.pdf#search=%22british%20 perceptions%20of%20germany%22 [Accessed 11 April 2007]

GNTB, 2007a. *Kurz-marktinformation Vereinigtes Koenigreich 2007* [online]. Frankfurt: DZT. Available from: http://www.deutschland-tourismus.de/pdf/MI_KURZ_Grossbritannien_2007.pdf [Accessed 11 April 2007]

GNTB, 2006a. *Ueber uns* [online]. Frankfurt: DZT. Available from: http://www.deutschland-tourismus.de/ DEU/ueber_uns/ueber-uns.htm [Accessed 11 April 2007]

GNTB, 2006b. *Translated extract of the market information UK and Ireland 2006.* London: GNTB

GOOSSENS, C., 2000. Tourism Information and Pleasure Motivation. *Annals of Tourism Research,* Vol. 27 (2), pp301-321.

GUNN, C., 1988. *Vacationscape: designing tourist regions.* 2nd ed. New York: Van Nostrand Reinhold

HANKINSON, G., 2004. Repertory Grid Analysis: An application to the measurement of destination images. *International Journal of Nonprofit and Voluntary Sector Marketing,* Vol. 9 (2), pp145-153.

JENKINS, O., 2003. Photography and travel brochures: the circle of representation. *Tourism Geographies,* Vol. 5 (3), pp305 – 328.

JOPPE, M., MARTIN, D. and WAALEN, J., 2001. Toronto's Image As a Destination: A Comparative Importance-Satisfaction Analysis by Origin of Visitor. *Journal of Travel Research,* Vol. 39 (February), pp252-260.

NATIONAL STATISTICS, 2001. *Census 2001* [online]. Newport: National Statistics. Available from: http://www.statistics.gov.uk/census2001/pyramids/pages/UK.asp [Accessed 11 April 2007]

O'LEARY, S. and DEEGAN, J., 2005. Ireland's Image as a Tourism Destination in France: Attribute Importance and Performance. *Journal of Travel Research,* Vol. 43 (February), pp247-256.

PIKE, S., 2003. The Use of Repertory Grid Analysis to Elicit Salient Short-Break Holiday Destination Attributes in New Zealand. *Journal of Travel Research,* Vol. 41 (February), pp315-319.

PIKE, S., 2002. Destination image analysis – a review of 142 papers from 1973 to 2000. *Tourism Management,* Vol. 23 (5), pp541-549.

PIKE, S. and RYAN, C., 2004. Destination Positioning Analysis through a Comparison of Cognitive, Affective, and Conative Perceptions. *Journal of Travel Research,* Vol. 42 (4), pp333-342 ●

RYAN, C. and CAVE, J., 2005. Structuring Destination Image: A Qualitative Approach. *Journal of Travel Research,* Vol. 44 (November), pp143-150.

SIRAKAYA, E., SONMEZ, S. and CHOI, H., 2001. Do Destination Images really matter? Predicting Destination Choices of Student Travellers. *Journal of Vacation Marketing,* Vol. 7 (2), pp125-142.

VAUGHAN, R. and EDWARDS, J., 1999. Experiential perceptions of two winter sun destinations: The Algarve and Cyprus. *Journal of Vacation Marketing,* Vol. 5 (4), pp356-368.

WITT, S. and MOUTINHO, L., 1995. *Tourism Marketing and Management Handbook.* Student ed. London: Prentice Hall