

Lisbon as a city break destination – competitive analysis as perceived by London travel agents

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Abstract

Tourist destinations mainly compete on their perceived images relative to competitors in the marketplace. If a destination is to be positioned in relation to its competitors, then it may be argued that asking individuals how they see the destination when compared to its competitors is more appropriate than evaluating the destinations individually. Previous research has failed to assess destination image from a direct competitive point of view. This study aimed to overcome this gap by proposing a methodology whereby a destination is directly compared to its competitors. It does it from a travel agents perspective because the images that these important elements of the tourism distribution channel hold about a destination are one of the determinants in the consumer decision-making process. Lisbon was compared to two other city break destinations (Copenhagen and Amsterdam) in both cognitive and affective images. Results showed that the competitive images of Lisbon were, to a certain extent, different to both destinations and overall Lisbon was perceived as more appealing destination for a city break than Copenhagen but less than Amsterdam. Implications for the management of Lisbon as a city break destination are discussed.

Keywords: destination image, travel agencies, city break, Lisbon

Resumo

Tourist destinations mainly compete on their perceived images relative to competitors in the marketplace. If a destination is to be positioned in relation to its competitors, then it may be argued that asking individuals how they see the destination when compared to its competitors is more appropriate than evaluating the destinations individually. Previous research has failed to assess destination image from a direct competitive point of view. This study aimed to overcome this gap by proposing a methodology whereby a destination is directly compared to its competitors. It does it from a travel agents perspective because the images that these important elements of the tourism distribution channel hold about a destination are one of the determinants in the consumer decision-making process. Lisbon was compared to two other city break destinations (Copenhagen and Amsterdam) in both cognitive and affective images. Results showed that the competitive images of Lisbon were, to a certain extent, different to both destinations and overall Lisbon was perceived as more appealing destination for a city break than Copenhagen but less than Amsterdam. Implications for the management of Lisbon as a city break destination are discussed.

Palavras-chave: imagem de destinos, agencias de viagens, city break, Lisboa

I. Introduction

After being awarded the World Exposition in 1998, Lisbon went through a process of modernisation. This substantially improved both the tourist infrastructure and the international image of the city. These changes, together with the creation of a public-private partnership to promote the city, led to the development of the leisure market, notably city breaks (Edwards *et al.*, 2002). In 2002 more than three quarters of the international tourists that visited Lisbon visited on holidays/city break, which is an increase of 4.8 percentage points when compared to the previous year (ATL, 2003). Tourists visiting Lisbon identified travel agents as having an influence in their choice of Lisbon as the destination: 6.6 percent said it

was decisive and a further 12.2 percent that it had some influence. Overall, the majority of tourists (55.5%) used to travel agencies to organise their journey (Turisver, 2003). Despite the importance of city breaks for tourism in Lisbon, there is limited knowledge on how the city is perceived as a city break destination.

City breaks are a very popular type of holiday for the British. Estimates indicate that in 2002 around 3.5 million Britons went on a city break abroad, representing more than 1 bn pounds of turnover (Mintel, 2002). Between 1996 and 2002 the city break market increased more than twofold in volume and 75 percent in value, with the main increase taking place to European destinations. In fact, European cities are the destination of slightly more than three quarters of the city breaks abroad (Mintel, 2002). One interesting characteristic of the evolution between 1999-2002 is a tendency to a decrease in the relative importance of the main cities and an increase among traditionally less important cities. This is likely to be the result of the strengthening of competitiveness of traditionally less important cities as well as an increase in the number of competitors. Since the choice of a destination is often influenced by the low cost of air transport, and more and more destinations are served by low cost airlines, the cities served by them are becoming more popular (Mintel, 2002). Intermediaries are still a very important distribution channel for the British, with travel agencies playing a key role in travel arrangements. Three quarters of the British citybreakers resorted to intermediaries to make the reservations of at least one travel component for the last city break taken abroad and nearly one third of the tourists have relied on travel agencies to organise the entire journey (Mintel, 2002).

As Echtner and Ritchie (1993) outlined, creating and managing the image of a destination is critical to effective positioning and marketing strategy. A product's position is the way in which an individual defines the product in respect to its important attributes, that is, it is the place the product occupies in a consumer's mind in relation to its competitors (Kotler *et al.*, 1999). Destinations can influence the tourist's image directly using pull strategies or indirectly using push strategies (Scott and Laws, 2001; Woodward, 2000). A pull strategy occurs when end consumers are induced by destination marketing to visit the destination. A push strategy requires the use of intermediaries to promote the destination among potential tourists. As Baloglu and Mangalolu (2001) pointed out, the images that travel agents hold about destinations are likely to influence their multiple and critical functions in marketing efforts, notably the provision of information to potential travellers. Influencing travel agent's

images of destinations can, therefore, influence tourist's images and ultimately the consumer decision-making process. If travel agent's images are known by tourism authorities, they would be in a better position not only to identify what such important image makers and sales channels think about the destination, but also to devise specific strategies to overcome possible image problems.

Thus, the aim of the study on which this paper is based was to identify the images of Lisbon as a city break destination when compared to two of its competitors – Copenhagen and Amsterdam – as perceived by London travel agents. Specific research questions were: (1) who are the main competitors of Lisbon as a city break destination as seen by travel agents? (2) What are the travel agent's competitive images of Lisbon as a city break destination when compared to Copenhagen and Amsterdam? (3) To what extent is Lisbon's appeal to the competitors different?

This study contributes to understanding destination image in two ways. First, it focuses on the destination images held by a highly neglected but very important component of the tourism distribution channel. Second, the majority of image studies that have attempted to study the competitive position of destinations have used indirect methods. This study utilises a direct approach whereby a destination is directly compared to its competitors.

II. Literature Review

II.1. Destination image

An image is a mental synthesis developed by consumers, based on a few selected impressions amid total perceptions (Font, 1997). Tourists have several images of destinations and these influence their behaviours, attitudes and predispositions as consumers (Ahmed, 1991). Thus, given the importance of image to a destination's performance, it is not surprising destination image has been one of the most studied areas within the tourism research arena and many methodologies to measure destination image have been suggested in the academic literature.

II.1.1 Destination image measurement

The Echtner and Ritchie (1993) classification of destination images has proved very popular in the literature (Hui and Wan, 2003; Rezende-Parker *et al.*, 2003; Konecnik, 2002; Baloglu

and Mangalolu, 2001; Vaughan and Edwards, 1999). They proposed a methodology whereby images can be classified along three continuums: attributes-holistic, functional-psychological and common-unique. While attributes are perceptions about individual attributes (such as weather, accommodation, attractions), holistic images are global impressions (such as hilly, exotic, romantic). Functional images are those that can be observable or measurable whilst those that are less tangible or harder to observe and measure are of psychological nature. These two continuums can be put on two intersecting axes and four types of images can be differentiated: the functional components, the functional image, the cognitive image and the cognitive assessment (Vaughan and Edwards, 1999). Finally, the common-unique continuum highlights the idea of destinations where the image can vary from perceptions based on common characteristics to other destinations to unique perceptions or auras. By adding the third continuum it is possible to classify the four types of images also as common or unique (for example, unique functional components images).

The revision of image studies conducted by Echther and Ritchie (1993) to propose the aforementioned framework revealed that destination image studies evaluated only the cognitive components. Baloglu and Brinberg (1997) pointed out that this practice might not be appropriate to study the complexity of destination image. Drawing on the work of Russel (1980), who argued that a place is not only determined by the physical characteristics of that place, Baloglu and Brinberg (1997) proposed a methodology to evaluate the affective components of destination image. The importance of the affective component (or attitude) in influencing human behaviour has been outlined by other theories, notable attitude theory (Ajzen, 1988; Fishbein and Ajzen, 1975). Baloglu and Brinberg's (1997) methodology for assessing affective images of destinations is composed by a bi-polar space comprising eight variables: pleasant-unpleasant, exciting-gloomy, stimulating-sleepy and relaxing-distressing. Since then many studies included the affective evaluation as part of the study methodology. While some have used the same eight bi-polar variables (Konecnik, 2002; Baloglu and Mangalolu, 2001), Vaughan and Edwards (1999) have included four other variables: surprising-predictable and safe-risky. Another study (OPTOUR, 2002) included Baloglu and Brinberg's scale as well as dangerous-risky and four other affective bipolar scales: boring-interesting and not entertaining-entertaining.

Another method to classify destination image was put forward by Gunn (1988). He proposed three stages for image formation – the organic, induced and experiential images. Organic

images result from assimilation of information that was not intended to create a specific image in the consumer's mind. Conversely, induced images of a destination arise from a conscious effort to promote that destination (e.g. tourism brochures). These will normally relate to the specific destination and what it offers and how it offers it (Vaughan and Edwards, 1999). Finally, experiential images result from the experience of visiting and using the services of a destination. This division is important because it differentiates between the images that can be influenced by the destination through communication from those that cannot.

Chon (1990) also put forward a methodology to classify destination images. According to the author, two types of images can be identified. Push images are the motivation of the tourist and pull images are the attractiveness of the destination. When making a decision, the individual confronts the two images and the destination that scores the lowest gap is likely to be chosen one.

II.1.2. Individual vs. competitive image

One of the methods to identify the image of a destination is by doing it individually – the individual image – whereby an individual is asked to evaluate a single destination according to his expectations or experiences. Another method that may be used to evaluate destination image is by comparing the destination with its competitors (Figure 1). This can be done through one of two ways. The first is by evaluating the individual images of two or more competitors and then comparing them – the indirect competitive image. The second asks the respondent to compare the destination with one or more of its competitors – the direct competitive image. While in the first each destination is evaluated based on the images of each individual evaluation and then the results compared, in the latter a third element is added which is the image of the competitor. Instead of evaluating whether the destination is good or bad, what is evaluated is whether the destination is better or worse (e.g. attractions), has more or less (e.g. attractive monuments), has higher or lower (e.g. prices) than its competitors. The more positive the difference to other destinations, the higher is the attraction for the tourist (Holloway, 2002). If destinations are to be positioned in relation to its competitors (Kotler *et al.*, 1999) and if destinations mainly compete on their perceived images relative to competitors in the marketplace (Baloglu and Mangalolu, 2001) then it may be more appropriate to ask respondents how they see the destination when compared to competitors instead of the destinations individually.

Many studies have evaluated the individual image (Andreu *et al.*, 2000; Godfrey, 1999; Chon, 1992) and the indirect competitive image (e.g. Baloglu and Mangaloglu, 2001; Tapachai and Waryszac, 2000; Baloglu and Brinberg, 1997; Echtner and Ritchie, 1993). Surprisingly, only one destination image study that has used a direct competitive approach was found (Baloglu, 1997). He compared only cognitive images and used a single evaluative continuum (from 'a lot better to' to 'not nearly as good' using a 5 point Likert-scale).

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II.2. Travel agents and destination marketing

When a destination management organisation plans its marketing activities, one of the variables it has to deal with is distribution. In the case of tourism, it is not normal for the destination management organisation to undertake distribution. Its role is to facilitate and influence the work of the elements in the distribution channel because tourism distribution channels often influence consumer behaviour (Buhalis, 2001). Many authors have pointed out that travel agents are one of the determinants of the consumer decision-making process (e.g. Ahmed, 1991; van Raaij, 1986). Furthermore, research has shown that those claims are well founded. Snepenger *et al.* (1990) studied information search strategies by destination-naive tourists and concluded that travel agents played a pivotal role as an information source. Menguc (1994) found that travellers perceived the recommendation of the travel agency as extremely important when purchasing a domestic tour.

Travellers resort to travel agencies as source of information because they see them as experts in product knowledge and someone who can give objective advice about the product (Holloway, 2002). That information is likely to be highly valued because the travel agent is regarded as an opinion leader (Lawton and Page, 1997). Thus, knowing their opinions about a destination is to understand what image is being conveyed to the tourist. Moreover, Baloglu and Mangaloglu (2001) found evidence for a relationship between intermediaries' images and selling of destinations. Therefore, studying travel agents images is a way to understand why the destination is promoted or not by them.

Despite the relevance of travel agent's images for destination marketing success, image studies have tended to focus on final consumers/tourists, either potential or actual. With few exceptions, the literature has failed to report the images of individuals who are likely influence tourists' images, notably travel intermediaries. Baloglu and Mangalolu (2001) identified differences in images between tour operators that promote and do not promote the destination. Others (Gartner and Shen, 1992; Roehl, 1990) have studied the impact of political events (Tiananmen Square) on China's tourism image. They found that political events could damage travel agents' attitudes toward tourism to the country where the events took place. In a different vein, Santos (1998) looked at how induced images (from tour operators promotional material) influenced destination image and consumer expectations. She found that tour operators were using their promotional material to create a heritage tourism image of China.

III. Methodology

III.1. The questionnaire

Primary data was collected through the administration of a questionnaire to London based travel agents. The first section identified the competitors of Lisbon in the city break market as well as travel agents experience of visiting Lisbon and the related competitor. Since there is not an agreement on what constitutes a city break (Beioley, 1999; Edgar, 2001; Mintel 1999, 2002), respondents were given a definition of what they should consider as a city break. For the purposes of the study, a city break was defined as a 'stay in commercial accommodation of one to three nights, which can also include other services such as transportation, meals and entertainment, the purpose of which is to enjoy a city abroad for leisure purposes'. The second section captured information about the competitive image of Lisbon as a city break destination when compared to one of its competitors. Since no previous studies were found that identified Lisbon's competitors in this segment, Lisbon Tourism Board (ATL) was asked to indicate what would be in their opinion the three most important competitors of Lisbon. Three cities were suggested: Amsterdam, Copenhagen and Munich. The argument used by ATL was that Lisbon does not compete with the major/traditional destinations, but with a 'second' division of city break destinations. Additionally, they lacked information about Lisbon's positioning in relation to these cities and therefore they would take advantage of the

study to know more about it. Respondents were given the chance to choose one of the three cities to compare with Lisbon. The major part of the questionnaire was devoted to the assessment of Lisbon's competitiveness as a city break destination. Both cognitive and affective dimensions were used. The destination attributes set was developed following a review of literature on destination image and city breaks. These are the pull factors that may lead travel agents to recommend a destination instead of its competitors. The affective attributes were derived from OPTOUR (2002). Cronbach's Alpha was used to measure the reliability of the scale and revealed a satisfactory internal consistency for the research instrument ($\alpha=0.73$). This value exceeds the 0.7 generally considered as acceptable (Palant, 2001) and thus the scale can be considered reliable with the study's sample. The ATL was also asked to comment on the comprehensiveness of the instrument and suggested two additional attributes. All the attributes were measured using a 7 point semantic differential scale. What respondents had to do was to directly compare Lisbon and the competitor. For example, one of the attributes aimed to assess whether travel agents evaluated Lisbon as a better destination for a short break than its competitor or not. Hence, they had on one extreme of the scale the expression 'overall, a better destination for a short break' and on the other 'overall, a worse destination for a short break'. The third section gathered socio-demographic information about the respondents as well as information about the travel agency.

II.2. Sampling

The source used to identify British travel agents was the Association of British Travel Agents official members list, which comprises around 7.000 travel agencies. Due to time and cost restrictions, only Greater London travel agencies were included in the study. A total of 622 agencies were identified and three quarters of these were randomly selected to receive the questionnaire. Each of the travel agency managers received an envelope containing a letter explaining the aim of the study and explaining how the respondent should be selected. The manager was told to select the travel salesperson whose birthday was nearest so that randomness in the selection of the respondent was kept. A stamped envelope from the UK to Portugal was also included so that travel agencies did not have to pay for the stamp. From the 467 questionnaires sent, a total of 90 questionnaires were received, although only 65 were usable. The remaining were returned blank together with letters from the agencies explaining that they were a business travel agency or did not operate in the city break market. From the 65 questionnaires received, 35 compared Lisbon to Amsterdam, 27 to Copenhagen and 3 to

Munich. The effective response rate was 13.9 percent. Only the questionnaires comparing Lisbon to Copenhagen and Amsterdam were used for analysis in this study.

III.3. Analysis

Prior to data analysis some of the items were re-coded to put the favourable position of Lisbon on the right side of the scale. The seven points of the scale were coded between -3 (the highest unfavourable position to Lisbon) and 3 (the highest favourable position to Lisbon), while 0 describes a similar competitive position.

The data were analysed using SPSS for Windows. The chi square test was used to test the null hypothesis that there was no association between city compared to Lisbon and gender, age, years in job and experience in visiting the two competitors. Chi square is used when the researcher wants to compare the observed frequencies of cases with those expected in a variable which has more than two categories (Bryman and Cramer, 2001). Pearson significance is used to determine whether the results could have arisen by chance or if the differences in the proportions are related to differences in the groups of the independent variable. In other words, Pearson significance shows the probability of obtaining a given result by chance.

The Mann-Whitney test was used to test the null hypothesis that the mean rankings of the two groups of the independent variable were equal (Bryman and Cramer, 2001). When the Mann-Whitney test is significant, it indicates that the probability of the differences between two groups have arisen by chance are lower than the pre-defined significance level. The Mann-Whitney test was used in the study to assess whether there were statistical differences in respondent's images according to city compared. Three different levels of significance level were used: 0.05, 0.01 and 0.001. The first means that the probability of obtaining a result by chance is 5 in 100, the second 1 in 100 and the third 1 in 1000.

IV. Findings and discussion

IV.1. Profile of travel agents and travel agencies

Table 1 provides details about the sample. As can be observed, there is a balance between male and females and the four age groups are well represented. The dominant age group is the

18-29 years (36.9%) and the less represented is the 50+ (16.9%), which is likely to reflect the employment profile of travel agencies. As to the level of experience, 3 out of ten respondents worked as salespersons for 20 or more years and more than half had more than 10 years of experience. Therefore, the sample was mainly composed by highly experienced travel consultants. More than half of the respondents indicated that they had visited Lisbon. From these slightly more than three-quarters have been only once, around 15 percent twice and less than 10 percent three or more times. The majority of those who had visited Lisbon did it for the last time during or after Expo'98. Given the major changes that had occurred in Lisbon following the hosting of Expo'98, they are expected to have more updated experiential images of the experience the city can provide. Chi-square tests were conducted to assess if the respondents who compared Lisbon to Copenhagen were different in terms of gender, age, years in job and experience in visiting Lisbon from those who compared Lisbon to Amsterdam. No statistical differences were found ($p>0.05$) and thus any differences that may exist are expected to have arisen by chance.

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Information about the business structure of travel agencies was also gathered. For more than 80% of the travel agencies surveyed leisure travel was the major source of income. The sales of short breaks only rarely exceeded 50 percent of the total sales volume leisure journeys, with almost half of the agencies indicating that the short break market comprised between 25 and 49 percent of the total leisure market.

IV.2 Competitors of Lisbon

Travel agents were questioned about the two destinations they would recommend to their customers together with Lisbon if one of their customers asked them to do so. The answers provided information about which are the competitors of Lisbon in the city break market as perceived by travel agents as well as the extent to which the cities used for comparison in the study were competitors of Lisbon. Table 2 provides the results.

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Nearly one third of the respondents indicated Barcelona as one of the two cities they would recommend. Paris (16,9%), Prague (12,9%) and Amsterdam (12,1%) followed and belong to the group of main competitors. Three Italian cities are among the second group of competitors (between 4 and 7 nominations), together with Madrid and Bruges. Finally, there seems to be a third group of competitors (with one or two nominations) composed by 10 cities, which includes Copenhagen. Based on these results, one of the competitors under comparison is a key competitor (Amsterdam), while the other (Copenhagen) was also nominated by one respondent, which indicates it is only a marginal competitor.

IV.3 Competitive images of Lisbon

IV.3.1. Cognitive images

The cognitive images of Lisbon competitiveness when compared to each of the two destinations are presented in Table 3. The mean values were ranked from the highest positive to the lowest negative value. Lisbon was generally more competitive when compared to Copenhagen than to Amsterdam. In 25 out of the 33 items Lisbon was perceived as more competitive than Copenhagen, while when compared to Amsterdam Lisbon was not competitive in the majority (17). ‘Weather for a short break’ and ‘restaurant prices’ were perceived the highest advantages of Lisbon when compared to both cities and scored more than 1 in the scale. Additionally, Lisbon was also perceived as very competitive in ‘local transportation prices’ when compared to Copenhagen. On the other end of the scale, Lisbon showed very bad competitiveness in Air Transport (both price and frequency) when compared to Amsterdam, as well as bad competitiveness in entertainment (nightlife and in streets), cost of journey and ‘accommodation price’. As to Copenhagen, Lisbon was perceived as having much higher accommodation prices and worse local standards of street cleanliness.

The Mann-Whitney test revealed that four variables were significantly different below 0.05, two below 0.01 and another four below 0.001. Lisbon was more competitive to Copenhagen

than to Amsterdam in ‘flight prices from London’, ‘nightlife’, ‘street entertainment’, ‘expensive trip’ (at the 0.001 level), ‘local transportation’ prices, ‘flight frequency from London’ (at the 0.01 level) and ‘overall, better destination for a short break’ (at the 0.05 level). Conversely, Lisbon showed higher competitiveness when compared to Amsterdam than to Copenhagen in ‘heritage interest’, ‘local standards of street cleanliness’ and ‘accommodation price’ (all at the 0.05 level).

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The 33 perceptual items were further grouped in categories that were believed to be important determinants of destination competitiveness. These categories are expected to reflect variables that travel agents use to evaluate tourist destinations and that destinations use to assess their competitiveness. The 11 categories, the variables composing each one and the average mean are presented in Table 4. As can be observed, some of the items were included in two different categories because some perceptions may be seen from two different points of view. For example, flight prices can be seen as a measure on how competitive Lisbon is in ‘price’ or in ‘transport and accessibility’.

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The mean values of each category were ranked from the highest positive to the lowest negative value. It can be observed that Lisbon was less competitive than Copenhagen only in two factors (‘accommodation’ and ‘environment and tourist support’), whilst it was evaluated more negatively than Amsterdam in five areas: ‘price’, ‘transport and accessibility’, ‘accommodation’, ‘global evaluation’, and ‘attractions: events and entertainment’. ‘Food’ and ‘natural attractions’ were the two categories in which Lisbon was more competitive when compared to the two cities. Conversely, ‘accommodation’ (to both competitors), ‘transport and accessibility’ when compared to Amsterdam and ‘environment and tourist support’ when compared to Copenhagen were the two categories in which Lisbon was less competitive.

Results may also be interpreted on how consistent is the competitiveness of a destination. A similar signal of the evaluation of both competitors may demonstrate a consistency in strengths and weaknesses of the destination (for the case Lisbon). Results suggest that Lisbon is consistently competitive in terms of attractions (except for ‘events and entertainment’), ‘food’ and ‘service quality’, though the later very little. Conversely, it is consistently not competitive in accommodation. The Mann-Whitney tests showed that the competitiveness between Lisbon and the two cities were different in 5 of the 11 categories. Lisbon was more competitive when compared with Copenhagen than with Amsterdam in ‘price’, ‘transport and accessibility’, ‘attractions: events and entertainment’ (at the 0.001 level), ‘accommodation’ and ‘global evaluation’ (at the 0.05 level).

4.3.2. Affective images

Lisbon yielded more positive affective images when compared to Copenhagen than to Amsterdam (Table 5). In fact, Lisbon was assessed negatively in only one feeling when compared to Copenhagen (more dangerous) while it was less exciting, less entertaining and less stimulating than Amsterdam. The Mann-Whitney test demonstrated that in three of the affective images the differences of competitiveness between Lisbon and the two cities were statistically significant. While Lisbon was seen as more exciting and more entertaining when compared to Copenhagen, it was less exciting and less entertaining than Amsterdam. These results are not surprising since they are likely to be a consequence of the cognitive evaluation of Lisbon in respect to entertainment and attractions. Conversely, Lisbon was seen as more dangerous than Copenhagen and safer than Amsterdam. It is possible that this evaluation reflects the image of free consumption of drugs often associated with Amsterdam and the traditional security of Scandinavian countries (and cities). When all the affective images were computed, Lisbon yielded a positive affective image when compared to both destinations and no statistical difference was found.

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IV.4. Limitations and further research

As Kotler et al. (1999) pointed out, the competitive analysis should include all those factors that the individuals recognise as influencing their decision. Although the items included in the survey were based on destination image measurement scales, the ultimate choice of items remained with the researcher. Thus, it is possible that not all pull images have been covered. Secondly, some caution should be taken when interpreting the results beyond the framework of the study. While one of the cities (Amsterdam) was clearly a competitor of Lisbon, the other (Copenhagen) was only a competitor in a limited way. Future research should include other competitors such as Barcelona, Paris and Prague. This research concentrated on travel agents images but future studies could be used to measure the destination images of the final consumer.

Thirdly, although the sample of respondents was varied in age, gender and experience, the low percentage response rate may have biased the sample. In addition, the number of participants can influence the likelihood of detecting a significant difference (Dancey and Reidy (2002). Thus, the low number of questionnaires increased the probability of having made a type II error (the null hypothesis was not rejected when, in fact, should have been). Although low response rates in organisational surveys are common and usually range from 1 to 20 percent (Baloglu and Mangaloglu, 2001; Paxton, 1995), future studies should guarantee a higher budget to data collection so that a higher number of questionnaires are used in the analysis.

Finally, opposite to past where destination image studies derived the competitive position from analysis of destinations individually, this research proposed a direct measurement whereby a destination is directly compared to its competitors. Future research could compare both methods in order to assess if they yield similar or different results.

V. Conclusion and implications

The results provided by this study have many practical uses in the marketing of Lisbon as a city break destination. First, this study revealed that, according to the travel agents, Barcelona would be the main city they would recommend for a city break together with Lisbon. The other three cities were Paris, Prague and Amsterdam. Thus, it appears that from the travel

agents point of view, these four cities compose the main set of competitors of Lisbon. This is not surprising since these cities are also amongst the most popular European city break destinations for the British (Intel, 2002). The 62 travel agents also mentioned another 15 cities, including Copenhagen, which suggests that the city break market is highly competitive with a large number of competitors spread throughout the continent, from north to south and from east to west.

Second, as Baloglu (1997) pointed out, destination image studies can be useful in devising effective positioning, differentiation and marketing strategy. Although it is possible that travel agents have a limited set of destinations and providers they can promote, it can be expected that they have a certain degree of autonomy on the choice of what to recommend to the potential tourist. Thus, the images they hold about the destinations are likely to play a major role in influencing what to recommend. This research attempted to study travel agents images of Lisbon when compared to two of its competitors. The competitive images of Lisbon were, to a certain extent, different to both destinations and overall Lisbon was perceived as a better destination for a city break than Copenhagen but worse than Amsterdam. It is not surprising that 'food' and 'natural attractions' were the two areas in which Lisbon was perceived as very competitive when compared to both destinations. Lisbon is a Southern European city and both Amsterdam and Copenhagen are located in the North. Residents in the northern countries are especially keen to visit southern destinations to enjoy different weather from that of home. As to food, Mediterranean gastronomy is significantly different from that of northern countries and is well appreciated all over the world. Not only has Lisbon a characteristic and varied gastronomy, but also the prices are significantly lower than those of its competitors, which give to Lisbon a very strong competitive advantage.

Lisbon has a strong competitive disadvantage in transportation when compared to Amsterdam. This result is not surprising since Amsterdam is much closer to London than Lisbon. Nonetheless, at a time when the cost of air transport influences the choice of a city break destination, Lisbon should re-think their accessibility strategy. Moital (2003) found that the four main competitors of Lisbon, as well as Copenhagen, were served by at least one low cost airline from London. On the other hand, Lisbon was not served by any low cost airline flying from British airports. He further found that when considering both low cost and 'traditional' airlines, Lisbon was the city with the highest fare from London. A low cost airline would provide the destination with cheaper flights and could oblige 'traditional'

airlines to reduce prices. Thus, Lisbon should endeavour to have at least one low cost airline flying from London if it wants to enhance its attractiveness in the British market.

The study also revealed that Lisbon lacks competitiveness at the accommodation level, both price and service quality. In fact, this was regarded as one of the most negative areas of Lisbon when compared to its competitors. Since major international and national hotel chains are present in Lisbon, it is possible that this reflects more a perception problem than a 'real' problem. From this study it is not possible to understand whether it is a perception or a 'real' problem and further research should be conducted to understand why travel agents evaluated it negatively. Lisbon performed generally very well in terms of attractions but needs more entertainment, both at night and in streets, especially if it wants to enhance its competitiveness to Amsterdam. Although there seems not to be shortage of pubs and dance clubs in the city, it is possible that there is a limited supply of other types of evening entertainment, such as shows based on local culture.

The affective analysis demonstrated that Lisbon should be promoted as an exciting and entertaining city in order to improve its competitiveness to Amsterdam. On the other hand, travel agents should be provided with information that would re-assure them that Lisbon is not a dangerous city because they perceived Lisbon as more dangerous than Copenhagen.

As Font (1997) outlined, "being aware of the relative position against competitor products, the destination will be able to build on its differential strengths" (p. 130). It is hoped that the methodology proposed as well as its results can assist destination marketers to achieve that goal.

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Figure 1: Destination image assessment: individual vs. competitive images

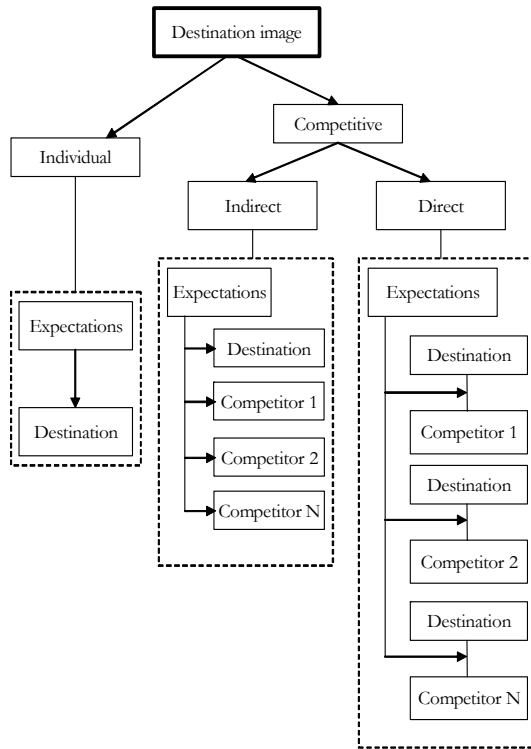


Table 1: Descriptive profile of travel agents

	Mean	Frequency
Gender (N=62)		
Male		49.2%
Female		50.8%
Age (N=62)	35.66	
18-29		36,9%
30-39		26,2%
40-49		20%
+50		16,9%
Years in job (N=62)	13.58	
1 to 3		23,1%
4 to 9		24,6%
10 to 19		21,5%
20+		30,8%
Visited Lisbon (N=62)		
Yes		53.8%
No		46,2%
How many times visited Lisbon (N=33)		
Once		75.8%
Twice		15.1%
Three or more		9.1%
When visited Lisbon last time (N=33)		
Before Expo'98		30.3%
During/after Expo'98		69.7%

Table 2: Main competitors of Lisbon as perceived by travel agents

City	City 1		City 2		Total	
	N	%	N	%	N	%
Barcelona	25	40,3	11	17,7	36	29,0
Paris	13	21,0	8	12,9	21	16,9
Prague	4	6,5	12	19,4	16	12,9
Amsterdam	3	4,8	12	19,4	15	12,1
Rome	2	3,2	5	8,1	7	5,6
Florence	3	4,8	1	1,6	4	3,2
Venice	2	3,2	2	3,2	4	3,2
Bruges	2	3,2	2	3,2	4	3,2
Madrid	3	4,8	1	1,6	4	3,2
Seville	1	1,6	1	1,6	2	1,6
Budapest	1	1,6	1	1,6	2	1,6
Dublin	1	1,6	1	1,6	2	1,6
Vienna	1	1,6	0	0,0	1	0,8
Brussels	0	0,0	1	1,6	1	0,8
Copenhagen	1	1,6	0	0,0	1	0,8
Granada	0	0,0	1	1,6	1	0,8
Athens	0	0,0	1	1,6	1	0,8
Stockholm	0	0,0	1	1,6	1	0,8
Sorrento	0	0,0	1	1,6	1	0,8
Total	62	100	62	100	124	100

Table 3: Cognitive images of Lisbon when compared to competitors

Variables	Copenhagen (N=27)		Amsterdam (N=35)		Sig. level
	Mean	Rank	Mean	Rank	
Weather for SB (less/more pleasant)	1.88	1	1.91	1	
Restaurant prices (higher/lower)	1.85	2	1.45	2	
Local transportation prices (higher/lower)	1.42	3	0.33	8	**
Cuisine (regular/characteristic)	1.00	4	1.06	3	
Expensive trip (less/more)	0.85	5	-0.74	30	***
Food variety (worse/better)	0.62	6	0.47	7	
Overall, better destination for SB (worse/better)	0.58	7	-0.12	21	*
Things to see in the surroundings (less/more)	0.42	8	0.78	5	
Variety of monuments (less/wider)	0.42	9	0.33	9	
Nightlife (worse/better)	0.38	10	-0.94	31	***
Street entertainment (worse/better)	0.36	11	-0.72	29	***
Shopping (worse/better)	0.35	12	-0.09	19	
Places of interest (few/many)	0.31	13	0.12	15	
Tourist's evaluation of services (more positive/more negative)	0.27	14	0.16	14	
Organised city tours (less/more)	0.23	15	-0.09	20	
Cultural attractions prices (higher/lower)	0.19	16	0.21	11	
Tourist complains about service in Lisbon (more/less)	0.19	17	0.10	16	
Natural beauty (offers less/offers more)	0.15	18	0.56	6	
Heritage interest (lower/higher)	0.12	19	0.79	4	*
Flight prices from London (higher/lower)	0.12	20	-1.91	33	***
Local transportation network (worse/better)	0.12	21	-0.29	27	
Variety of cultural events (lower/higher)	0.12	22	0.26	10	
Museum variety (worse/better)	0.08	23	-0.24	26	
Convenient opening hours of monuments (less/more)	0.0	24	-0.16	23	
Tourist information service (worse/better)	0.0	25	-0.19	25	
Pedestrian areas (worse/better)	-0.04	26	-0.03	17	
Interesting museums (less/more)	-0.04	27	-0.18	24	
Flight frequency from London (worse/better)	-0.15	28	-1.21	32	**
General service quality (lower/higher)	-0.23	29	0.21	12	
Accommodation service quality (worse/better)	-0.27	30	-0.12	22	
Signage (worse/better)	-0.4	31	-0.07	18	
Local standards of street cleanliness (worse/better)	-0.62	32	0.21	13	*
Accommodation price (higher/lower)	-1.69	33	-0.66	28	*

* at the 0.05 level; ** at the 0.01 level; *** at the 0.001 level

Table 4 – Cognitive evaluation of Lisbon according to category

Category	Attributes	Copenhagen (N=27)		Amsterdam (N=35)		Sig. level
		Mean	Rank	Mean	Rank	
Food (3)	Cuisine, Restaurant prices, Food variety	1.15	1	1.00	2	
Natural Attractions (2)	Weather for SB, Natural beauty	1.02	2	1.18	1	
Global Evaluation (1)	Overall, better destination for SB	0.58	3	-0.12	7	*
Price (5)	Restaurant, Local transportation, light, Accommodation and Expensive trip	0.50	4	-0.29	8	***
Transport and Accessibility (4)	Local transportation prices, Flight prices, Flight frequency, Local transportation network	0.38	5	-0.80	11	***
Attractions: General	Things to see in the surroundings, Places of interest	0.37	6	0.46	3	
Attractions: Events and Entertainment (5)	Nightlife, Street entertainment, Shopping, Organised city tours, Variety of cultural events	0.29	7	-0.33	9	***
Cultural Attractions (7)	Variety of monuments, Cultural attractions prices, Heritage interest, Museum variety, Interesting museums, Convenient opening hours of monuments, Variety of cultural events	0.13	8	0.14	4	
Service Quality (4)	Tourist's evaluation, Tourist complains, General, Accommodation	0	9	0.08	5	
Environment and Tourist Support (4)	Tourist information service, Pedestrian areas, Signage, Local standards of street cleanliness	-0.27	10	0.01	6	
Accommodation (2)	Price, Service quality	-0.98	11	-0.38	10	*

* At 0.05 level; ** at the 0.01 level; *** at the 0.001 level

Table 5: Affective images of Lisbon when compared to competitors

Affective descriptors	Copenhagen (N=27)		Amsterdam (N=35)		Sig. level
	Mean	Rank	Mean	Rank	
Exciting (less/more)	0.76	1	-0.33	6	***
Stressful/relaxing (more/more)	0.72	2	0.97	1	
Pleasant (less/more)	0.60	3	0.67	3	
Entertaining (less/more)	0.28	4	-0.42	7	*
Stimulating (less/more)	0.12	5	-0.09	5	
Boring/interesting (more/more)	0.12	5	0.13	4	
Dangerous/safer (less/-)	-0.20	7	0.70	2	**
Average of category 'affection'	0.69	-	0.51	-	

* At 0.05 level; ** at the 0.01 level; *** at the 0.001 level